Maximizer™ CRM 10.5

User's Guide

Maximizer Software
Simply Successful CRM

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This document applies to Maximizer CRM 10.5 R2 software.

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CHAPTER 1

Welcome to Maximizer

Introducing Maximizer CRM

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"Maximizer on the Web" on page 9

"Maximizer CRM Editions" on page 10

"Where to Go from Here..." on page 11

From Prospects to Leads to Repeat Customers

You are a growing company, looking to take your organization to the next level. To reach this goal and create long-term, profitable relationships with your customers, you need a cost-effective, flexible Customer Relationship Management solution to keep all your departments working together effectively.

Designed for small- and medium-sized businesses, Maximizer CRM 10.5 integrates sales, marketing, and customer service tools, enabling all customer touch points in your organization to face customers and prospects professionally through one voice.

Throughout the customer life cycle, as prospects from marketing are turned over to the sales department, and customers are passed onto service departments, Maximizer CRM makes it easy for your staff to share information, communicate with customers through multiple channels, and organize individual and team efforts. Making your customers feel like king, and giving you an edge over your competitors. After all, gaining new customers and retaining satisfied ones is what improving the bottom line and growing your business is all about.

Sales—Save Time, Close More Sales

Maximizer CRM enables your sales staff to manage, track, communicate, and report through all phases of the sales cycle to help them work more efficiently and close more sales. Only Maximizer CRM enables you to view the big picture of your customers, as well as the details of each one, so you can leverage each customer opportunity and maximize your total revenue. It is the only solution in its class to offer extensive flexibility, workgroup security, and advanced sales automation and collaboration features. Further, Maximizer CRM is easy to use for sales people so they spend less time on administrative tasks and more time on selling.

Marketing—Reduce Costs, Generate More Leads

Attracting attention and generating leads for the sales department is the foundation of marketing. Now Maximizer CRM integrates marketing in its total CRM solution to enable marketing departments to manage, track, and measure cost-effective marketing campaigns that deliver more qualified leads to your sales people. Using the Campaigns window, you can create highly targeted campaigns through profiling and qualifying to retain customers and increase business.

Customer Service—Increase Efficiency, Improve Customer Satisfaction

Attracting attention to your products and services is the foundation of Sales and Marketing, but consistent, high-quality customer service is the foundation for keeping your customers for life. After all, it is far more expensive to gain a new customer than it is to retain an existing one. Maximizer CRM enables you to cultivate and maintain long-term, profitable relationships by recording and quickly recalling every form of past contact with your customers, so you can exceed your customers' expectations and recommend the right solutions, at the right time. Cross-selling and up-selling are easy when you know your customer's history better than they can remember it themselves!

eBusiness—Generate Leads and Revenue from Your Website

A successful business depends on the relationships you build with your customers. But to save time and conduct repeat purchases, buyers are moving to the web. With the built-in eStore Manager, Maximizer CRM lets you easily integrate your web front with your CRM solution for lead generation and online purchases.

Anywhere Access

Your staff is spread out around the continent or around the world, they're on the go at client locations, but you can't afford to have any downtime or inaccurate customer information. Maximizer CRM's strength is in its capability to give your staff access to critical data from anywhere, at any time, on any device—at a remote office, through the web, or on a Palm OS/Pocket PC device.

Remote Access Through MaxExchange

For users in remote offices to effectively team-sell and face clients and prospects with accurate information, they need to have access to up-to-the-minute data. MaxExchange enables Maximizer CRM users to work from a single database that is regularly synchronized to keep everyone current.

Palm, Blackberry, and Handspring Access Through MaxLink and MaxMobile

For the mobile sales force, MaxLink and MaxMobile enable you to easily access your Maximizer CRM information from your desktop PC from a Palm OS, Blackberry, or Pocket PC device. You can then update or add information while out of the office.

Refer to the MaxLink and MaxMobile online manual for more information.

Web Access

Maximizer's web access sites are browser-based tools that improve your organization's efficiency by enabling you and your staff to carry out everyday tasks, from wherever you are, with any computer. See the Maximizer on the Web chapter for more information.

Extend Maximizer CRM to Fit Your Needs

The Maximizer CRM Customization Suite includes additional guides for integrating with Maximizer. The Customization Suite enables customers and business partners to customize the Maximizer interface and to integrate with other front-office and back-office solutions.

Maximizer Modules

Maximizer

Maximizer CRM is a robust customer relationship management solution that tightly integrates your contact manager, customer service, and sales requirements.

Maximizer's customer service, knowledge base, and order management features allow you to track and retrieve all customer queries, issues, resolutions, and purchases. Opportunities provide customizable sales strategies that can be used by your sales team to track, communicate, and report through all phases of the sales cycle, with the probability of close being calculated at every stage.

With the creation of meaningful graphs and charts, companies benefit from complete, detailed intelligence to fully understand their audience and evaluate the performance of their business.

The Campaigns window provides you with a tool to set up Automated campaigns—a series of highly-targeted automated email, fax, or print documents—that introduce services, encourage product purchases, promote website visits, or distribute electronic newsletters. Once you have defined the various campaign pieces, and launched the campaign, the process is entirely automated. You can also create "traditional" marketing campaigns that coordinate the activities of marketing team members.

Administrator

Administrator is typically used by a system administrator or other technically-proficient staff to configure and manage the entire Maximizer application. Among other administrative tasks, Administrator is used to create and manage Maximizer users, apply licensing, and create new databases (or "Address Books").

You can also do tasks that are common to both Maximizer and Administrator such as back up data, import and export data, produce system reports, and set up and manage sales/marketing teams and security groups.

Reporter

Reporter improves your marketing and selling campaigns by reporting on the success of your current and past strategies. Reporter provides you with several report templates allowing you to produce impressive results in just a few seconds. The module can be accessed through or from the Start menu. See the Maximizer on the Web chapter.

Maximizer Companion Applications

There's more to Maximizer CRM than just the main modules. See the following descriptions of our Maximizer companion products.

Microsoft SQL Server Reporting Service Viewer

For more information on configuring Maximizer for use with Microsoft SQL Server Reporting Services, see the Administrator's Guide.

Maximizer CRM includes a Microsoft Report Viewer in the installation. Microsoft Reporting Services is a comprehensive reporting tool that integrates with a diverse set of data sources. The full installation for the SQL Server Reporting Services is available from the Microsoft SQL Server CD.

MaxExchange

MaxExchange is a separate Maximizer application that is opened from the Start menu. It allows you to synchronize Maximizer data between a server and remote computers.

For Maximizer Remote users, refer to "Using MaxExchange Remote" on page 459. For administrators of MaxExchange, refer to the *MaxExchange Administrator's Guide*.

Workflow Automation Powered by KnowledgeSync

Workflow Automation Powered by KnowledgeSync is a separate Maximizer application that allows you to monitor business data within the Maximizer database and other systems. Potential issues are identified before they create problems so that the people who need to know can act on the information. With Workflow Automation, you can apply business rules to all of your data—no matter where it resides—and learn of potential issues while there is still time to act.

Using Workflow Automation, you can send flexible real-time alert messages via email, fax, pager, PDA (such as Palm or Handspring), and webcast. It's easy to schedule and deliver reports. Lead qualification, lead assignment, and lead tracking are completely automated. Powerful and flexible, the Workflow Automation Suite is quickly deployed, simple to use, and easy to administer so you can focus on building successful, profitable customer relationships.

Accounting Link

Maximizer offers two accounting integrations: Accounting Link Designed for Use with QuickBooks®, and Accounting Link for Microsoft Dynamics™ GP. Accounting Link enables you to create estimates, invoices, and purchase orders from within Maximizer and share them with your QuickBooks or Microsoft Dynamics GP software.

eStore

eStore is an online store that provides you with the tools to automate your web-based sales. eStore includes everything you need—a shopping cart and product configuring tool, online transaction processing, credit card gateway links, and online credit checking. This application is available for Maximizer CRM Professional Edition and Maximizer CRM Enterprise Edition.

ecBuilder

ecBuilder is an online store that provides the same functionality as eStore. This application is available for Maximizer CRM Group Edition.

Refer to your ecBuilder online manual and help installed with the application. You can access the online manual from the Start menu.

MaxLink/MaxMobile

Combined with Maximizer, MaxLink or MaxMobile form a powerful suite of tools offering you all of the contact management features of Maximizer with the portability and convenience of a handheld device. Whether at work or on the road, you always have access to current information about your clients or customers—names, addresses, appointments, tasks, and notes. Simply use either application to synchronize record additions, changes, and deletions between the two products. When data is synchronized regularly, performance speed is optimal because only records that have been modified are read during the process.

MaxAlarm

MaxAlarm is a Maximizer companion application that automatically monitors appointments for one or more people in any number of Address Books. MaxAlarm automatically starts when you start your computer, and you can leave it running with or without running Maximizer, and still be notified of appointments. You will know if

MaxAlarm is running because its icon appears in your Windows System Tray, which is in the lower right corner of your screen.

MaxAlarm is easy to use. Simply add one or more Address Books to MaxAlarm, minimize it and then forget about it—until the Alarm dialog pops up to remind you of an appointment. With MaxAlarm's Review feature, you can review today's appointments without opening an Address Book in Maximizer.

MaxFinder

MaxFinder, also a Maximizer companion application, lets you browse or search for entries in a Maximizer Address Book. As with MaxAlarm, MaxFinder automatically starts when you start your computer, and its icon resides in your Windows System Tray.

MaxFinder provides a fast alternative for quick lookups and even allows you to record phone calls, time activities, or write notes for any entry in your Address Book without opening a Maximizer Address Book.

Maximizer Form Designer

Maximizer Form Designer allows you to create custom dialog boxes (forms). When adding or modifying Address Book entries, you can then select the form you want to use. To access Maximizer Form Designer from Maximizer's Tools menu, you must choose the Maximizer Form Designer option during a custom installation.

For more information, refer to the online manual installed with Maximizer CRM (Help menu > Maximizer Form Designer Guide). You can also refer to the Maximizer Form Designer Help for assistance.

Maximizer on the Web

Maximizer's web access sites give remote users access to the central Maximizer database via the web.

Maximizer Web Access

Maximizer Web Access is a browser-based application providing you with the functionality of Maximizer from anywhere in the world. You can work with Address Book entry information, notes, calendar appointments, Hotlist tasks, user-defined fields, customer service cases, knowledge base articles, and opportunities, as well as view company documents and other pertinent information.

- Reporter improves your marketing and selling campaigns by reporting on the success of your current and past strategies. Reporter provides you with several report templates allowing you to produce impressive results in just a few seconds.
- Dashboard is a component of Maximizer Web Access that can be used for monitoring the activity occurring in your company. The information you see in Dashboard is generated in "real-time", so you have an up-to-date view of the activities taking place in Sales and Marketing. Information such as how many opportunities are in the funnel and your daily revenue from online purchases can be accessed instantaneously.

Partner Access

Partner Access is a browser-based application providing a two-way flow of information between your organization and its business partners. This allows for a multi-tier distribution group to effectively distribute sales opportunities and leads, and to keep all involved parties informed about the latest news and customer service issues.

Customer Access

Customer Access is similar to Partner Access. It's a browser-based application providing a two-way flow of information between your organization and its customers. Customers have access to news, events, and customer service issues.

Wireless Access

Wireless Access provides access to Maximizer through any wireless Internet-enabled device.

Maximizer CRM Editions

There are three Maximizer CRM Editions:

- Maximizer CRM Group Edition
- Maximizer CRM Professional Edition
- Maximizer CRM Enterprise Edition

The availability of some functionality varies, depending on the edition you are running.

Functionality	**Module**	**Group**	**Professional**	**Enterprise**
Territory Management	Sales	☒	☒	☑
Fax/Print Campaigns	Marketing	☒	☒	☑
Knowledge Base	Customer Service	☒	☒	☑
Windows Authentication	Security	☒	☑	☑
Single Sign-On	Security	☒	☑	☑
Web Reporting	Business Intelligence	☒	☑	☑
Workflow Events[a]	See footnote [a]	☒	☑	☑
Dashboard	N/A	☑	☑	☑
Enable/Disable Security[b]	Security	☑	☒	☒
Global/Local option[c]	N/A	☑	See footnote [d]	See footnote [d]
Web access sites	N/A	☑	☑	☑
ecBuilder	N/A	☑	☒	☒
eStore	N/A	☒	☑	☑
Microsoft SQL Server Analytics	N/A	☒	☑	☑
Microsoft SQL Server Reporting	N/A	☒	☑	☑

a. Additional workflow events (KnowledgeSync) are included in some editions. Maximizer CRM Professional Edition includes additional workflow events in the Business Intelligence and Security modules. Maximizer CRM Enterprise Edition includes additional workflow events in the Sales, Marketing, Customer, Service, Business Intelligence, and Security modules.

b. Set in Administrator. (Select File > Preferences > System Options.) If security is disabled, you cannot set the following options: Read Access, Full Access, and Creator.

c. This option gives you access to Global and Local Address Book lists. Global Address Books are stored on the Maximizer server application. Local Address Books are stored locally on your computer.

d. Pertains only if MaxExchange Remote is installed.

Where to Go from Here...

Explore Maximizer in a safe training ground

The Maximizer Training Guide is designed to introduce you to the fundamentals of using Maximizer. Using the example of Escona Estate Wines—a fictitious vintner in the Sonoma Valley—you can follow tutorials that take you through real-world examples of how to use the various components of Maximizer. Daily tasks in marketing, sales, and administration give you the springboard you need as a novice user to start you on your way to being a Maximizer expert.

To order the Maximizer Training Guide, contact your nearest Maximizer office or your local Maximizer Business Partner.

CHAPTER 2

Finding Information

Access Maximizer CRM Help and User Guides

In this chapter...

"Overview" on page 14

"Press F1 for Help" on page 15

"Opening the Help Table of Contents" on page 16

"Reading the Maximizer Guides Online" on page 17

"Exploring Maximizer with the Sample Address Books" on page 18

Overview

Maximizer Help is your comprehensive guide to working with the Maximizer modules. As you work with Maximizer, you probably already know what business task you want to accomplish—such as sending a fax to many recipients, building and publishing your online catalog, and recording your contact management information. Maximizer's help and guides have the answers you are looking for.

The types of documentation you can expect to find to help you with Maximizer include:

- **F1 Help** – Context-sensitive help for all windows and dialog boxes.
- **Contents Help** – Online step-by-step instructions with a table of contents, an index, and search.
- **Online manuals** – On-screen versions of the printed documentation that you can read using Adobe Acrobat Reader.

Whether you are looking for help using a particular dialog box or looking for instructions on how to perform an activity, you can always find what you are looking for in the Help. Maximizer Help provides not only step-by-step instructions for each module, but also detailed descriptions of every control in every dialog box and window. See "Press F1 for Help" on page 15 and "Opening the Help Table of Contents" on page 16.

Each Maximizer module has its own Help. To find out how to use a module, select Contents from the module's Help menu or press F1 in any window or dialog box.

In addition to the Maximizer User's Guide (this book), Maximizer also includes online documentation in Adobe PDF format. You can read the PDFs using Adobe Acrobat or Acrobat Reader, which you can download from the Adobe website (www.adobe.com). See "Reading the Maximizer Guides Online" on page 17.

Press F1 for Help

If you come across a window or dialog box you don't know how to use, press the F1 key to see brief descriptions of the window or dialog box options. Frequently, F1 Help topics have convenient links to related step-by-step instructions.

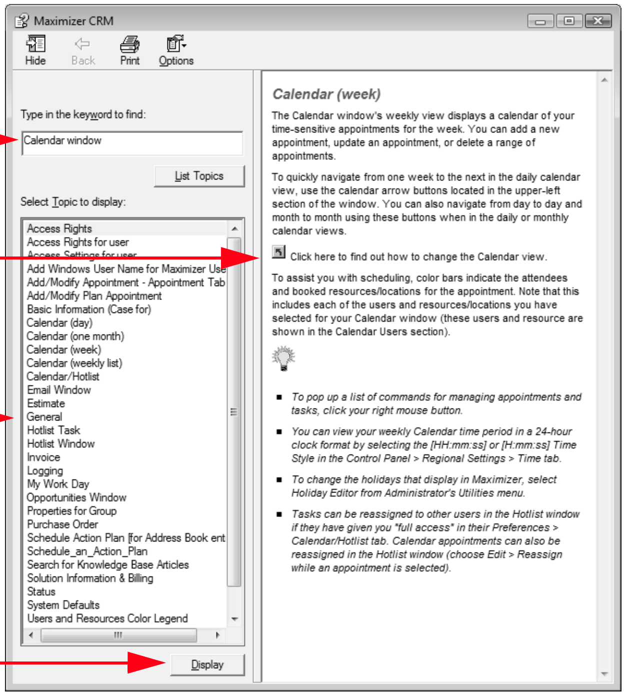
From the F1 Help window you can search the module's F1 Help for information on other windows, dialog boxes, or features—simply enter a keyword.

Enter a keyword and click List Topics to search for topics containing the keyword.

"Shortcuts" like this one link you directly to more information about what you are doing.

Topics containing your search keyword are displayed in this list.

Click this button to open the selected topic. You can also open a topic by double-clicking it.



Opening the Help Table of Contents

You can look up Help topics the same way you would in a book—the table of contents lists the topics in a logical order, and the index lets you look up topics by keyword. Maximizer Help also lets you perform a search for any word or words in any topic.

➤ To open the Help Contents for a module

- In any module, select **Help** > **Contents**.

➤ To print one topic

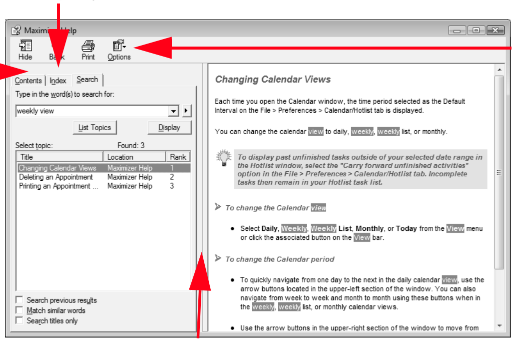
- Select the topic in the Contents and click **Print**.

➤ To print multiple topics

1. Select a book in the Contents.
2. Click **Print**.
3. Select **Print the selected heading and all subtopics**.

➤ Search for topics by any word or words

- In the **Search** tab, type the word or words you are looking for and click **List Topics**. Help lists the matching topics and ranks them by how close the topics match your search parameters.



Reading the Maximizer Guides Online

A typical installation of Maximizer includes manuals that you can read online using Adobe Acrobat or Acrobat Reader. Having the Maximizer manuals in this format offers the advantage of full-text search, as well as hyperlinks on the table of contents, index, and any cross-references.

➤ Install Adobe Acrobat Reader

- You need Adobe Acrobat Reader to open the online manuals. You can download the free Reader from the Adobe website (www.adobe.com).

➤ To access the online guides

- From the Help menu, select the guide you would like to use.

  – or –

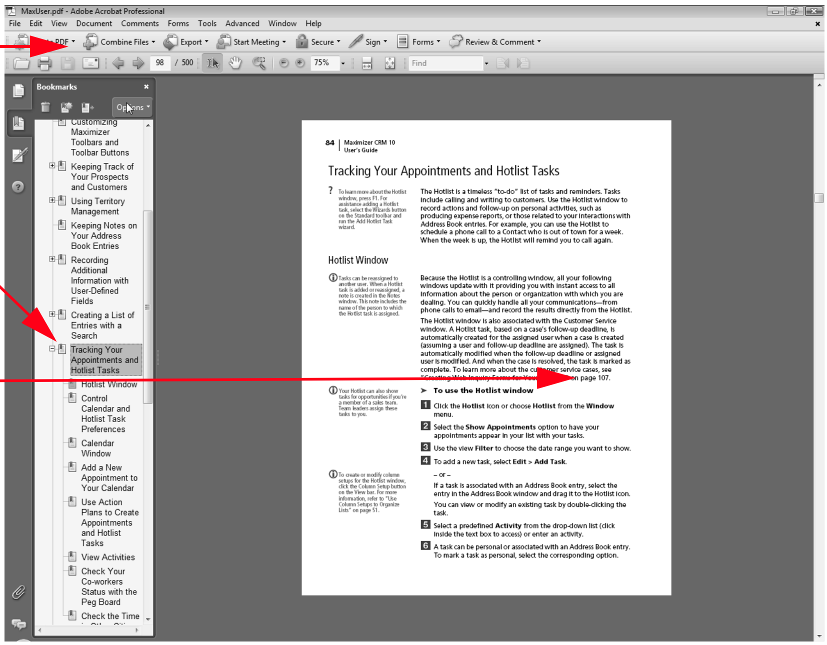
- From the Start menu, select Programs > Maximizer CRM > Documentation and Help > User’s Guide/Administrator’s Guide.

If you want to increase the size of the text, you can easily adjust the magnification. Open the **View** menu, and select **Zoom To**.

Use the toolbar to navigate—turn the page, change the magnification, search for text in the manual, and more.

Click on a heading in the table of contents to open the page you want.

Click on a referenced topic page number to go directly to the topic.



The pages appear on the screen as they would if they were printed—all of the graphics and text appear the same as in the printed manual. You can "turn the page" by using the previous and next arrows or pressing the Page Up or Page Down keys.

Exploring Maximizer with the Sample Address Books

In a typical server installation of Maximizer, the Maximizer setup program creates several complete sample Address Books, one of which is named "Escona Tutorial". This Address Book is designed to be used as an environment in which you can learn how to use Maximizer. You can supplement your learning experience through the use of the *Maximizer Training Guide* and CD.

Using the example of Escona Estate Wines, a fictitious vintner in California's Sonoma Valley, the Escona Address Book provides realistic examples of how Maximizer might be used to improve your customer relationship management.

The Escona Address Book includes detailed data related to all areas of Maximizer including the following:

- List of Address Book entries (Companies, Individuals, and Contacts)
- Sample sales opportunities and marketing campaigns
- Sample customer service cases
- Appointments and Hotlist tasks
- Sample Company Library files
- Fully enabled web access sites
- eStore online catalog project

CHAPTER 3

Working with Maximizer

Manage Your Address Book Entries

In this chapter...

"What is Maximizer CRM?" on page 20

"Opening an Address Book" on page 25

"My Work Day View" on page 27

"Working with Dashboard" on page 29

"Main Address Book Window" on page 35

"Customizing Maximizer Toolbars and Toolbar Buttons" on page 39

"Keeping Track of Your Prospects and Customers" on page 44

"Using Territory Management" on page 55

"Keeping Notes on Your Address Book Entries" on page 60

"Recording Additional Information with User-Defined Fields" on page 65

"Creating Lists of Entries with Searches" on page 76

"Tracking Your Appointments and Hotlist Tasks" on page 84

"Using Organizational Charts" on page 100

"Sharing Your Files in the Company Library" on page 102

"Making Entries in Your Journal" on page 105

"Monitoring Income and Expenses" on page 106

"Creating Web Inquiry Forms for Your Website" on page 107

"Using OrderDesk" on page 109

"Maximizer CRM Gadgets" on page 119

What is Maximizer CRM?

Throughout this guide, Maximizer CRM is referred to as Maximizer.

Maximizer CRM is specifically designed for small and medium-sized businesses and corporate divisions of large companies. By integrating sales, marketing, and customer service tools into one affordable solution, Maximizer CRM helps organizations realize their primary customer management goal of having many profitable and satisfied customers.

Throughout the customer life cycle, as prospects move from the marketing department to the sales department, and as customers are passed onto service departments, Maximizer CRM enables an organization to communicate with its customers through multiple channels, to share information, and to organize individual and team efforts.

Maximizer CRM is a complete software solution that brings together elements of CRM, enterprise contact management, marketing automation, eCommerce, rapid website development, wireless access, and other related applications to meet the sales, marketing, and customer service challenges of modern businesses.

- Managing your company's lists of Companies, Individuals (people not associated with a Company), and Contacts (people associated with a Company or Individual).
- Keeping track of your scheduled appointments and tasks.
- Pursuing a sale using a structured sales strategy and team-based selling.
- Managing customer service and your knowledge base operations.
- Promoting your product through traditional and automated campaigns.
- Sending letters, faxes, or email messages to one or many recipients.
- Managing incoming orders and inquiries from your online catalog—payment, refunds, shipping, and reporting.
- Organizing and accessing your sales and marketing literature in a shared library.
- Generating reports from any of the lists—Address Book entries, opportunities, customer service cases, Hotlist tasks, and additional information you keep on your entries.

Maximizer Windows

The main Maximizer window is the Address Book window, which lists the Companies, Individuals, and Contacts in your Maximizer database (Address Book). The following list provides a brief description of each main window accessible from Maximizer.

My Work Day

The My Work Day view is an area where everyone in your company using Maximizer can see Hotlist tasks, appointments, and company announcements.

They can also access Dashboard from here.

Address Book

The Address Book window contains all the information about your prospects, customers, business and professional associates, or any other group of people you deal with on a regular basis. It links you to related information about each Address Book entry, such as Contacts, Hotlist tasks, customer service cases, opportunities, campaigns, documents, user-defined fields, and orders and inquiries.

Opportunities

The Opportunities window helps you and your colleagues manage complex sales that involve the participation of more than one person in the buying decision and require the support of a sales team.

Use the Opportunities following window to view the opportunities associated with the entries selected in the Address Book window.

Customer Service

The Customer Service window supports and enhances your existing customer service business processes. All Address Book entry issues can be recorded, categorized, and escalated appropriately to ensure issues are dealt with in a timely manner. The Customer Service window is tightly integrated with the Knowledge Base window. When a case is resolved, you can enter an explanation of how the case was resolved and save the article in the Maximizer Knowledge Base.

The Customer Service following window displays the customer service cases associated with the current entry in the Address Book window. You can add and modify cases for the selected entry only.

Campaigns

The Campaigns window allows you to create and manage both traditional and automated campaigns. Marketing efforts are easily coordinated amongst your marketing teams. And, through the use of campaign templates, you can create campaigns quickly by modifying the campaign elements.

The Automated Campaigns following window displays all automated campaigns for the current entry in the Address Book window.

Knowledge Base

The Knowledge Base window provides you with a library-style tool to manage your customer service solutions; the window is tightly integrated with the Customer Service window. An article is typically created for each case solution, answered question, or guideline relating to your products or services.

Hotlist

The Hotlist is a to-do list of tasks and reminders that are usually timeless. The Hotlist is where you record actions and follow-up activities related to your interactions with Companies, Individuals, and Contacts. For example, you can use the Hotlist to schedule a phone call to a Contact who is out of town for a week. When the week is up, the Hotlist will remind you to call again.

Calendar

The Calendar window allows you to schedule, print, and view your appointments with Maximizer users or Address Book entries. Because the calendar works with the Peg Board feature, you can make sure that when you have an appointment, others can see when you are busy or out of the office. If you need to be reminded of an appointment, Maximizer can sound an alarm in advance of the appointment or task.

Email

The Email window provides you with the ability to send, receive, and preview email within Maximizer using your existing email system. Maximizer allows email file attachments and supports the vCard standard for virtual business cards. You can send files, mail-merge documents, and vCards quickly and easily. Additionally, you can transfer data files by email.

Contacts

The Contacts window displays the current Contacts for the Company or Individual selected in the Address Book, Customer Service, Campaigns, Hotlist, or Opportunities window. You can use this window to add, update, or delete a Contact.

Notes

The Notes window records your Address Book activities and displays only those notes that belong to the selected Address Book entry, customer service case, campaign, or opportunity.

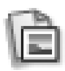
User-Defined Fields

The User-Defined Fields window displays the custom fields for the selected Address Book entry, customer service case, campaign, or opportunity. You assign values to these fields, and, if your system administrator has given you the access rights, you can add, change, or delete user-defined fields.

Personal

The Personal window contains the Journal and Expenses windows, which provide a location to keep notes and financial records that are not associated with Address Book entries.

Documents



The Documents window displays the document entries for the selected Address Book entry, customer service case, campaign, or opportunity. You can add new documents, as well as files not created in Maximizer, modify documents, campaign, or delete documents.

Company Library

The Company Library is used to store vital sales and marketing information for everyone to access. The Company Library allows you to preview and open any note and many types of files in the preview pane.

OrderDesk

When you receive orders or inquiries from your website, you can manage them using the OrderDesk window. You can use the same OrderDesk window to enter a new order, capture a payment for an

order, pre-authorize a payment for an order, complete a pre-authorized payment for an order, and refund a payment for orders that come to you by telephone, mail, or other methods. OrderDesk allows you to track the status of your inquiries and orders, whether your customers have received a response or had their order fulfilled.

Use the Address Book OrderDesk following window to view the orders and inquiries associated with the entries selected in the Address Book, Opportunities, or Customer Service window.

Accounting

You can access this window if you have the Accounting Link Designed for use with QuickBooks®, or the Accounting Link for Microsoft Dynamics™ GP add-on component installed. This window contains all your invoices, estimates, and purchase orders for your Address Book entries. You can create these items in Maximizer and the transactions are automatically shared with your QuickBooks or Microsoft Dynamics GP software.

For information on using Accounting Link, see the online manual.

Window Layout

You can control what windows are displayed and how they are laid out. The Window > Window Settings > Window Layout menu provides three Maximizer window views—Classic, Outlook Style, and Custom.

- **Classic** displays the following windows below the controlling (main) windows. This setting is Maximizer's default window layout.
- **Outlook Style** is somewhat similar to Microsoft Outlook's display. The controlling windows form the left pane while the following windows occupy the top-right and bottom-right panes.
- **Custom** allows you to control what windows are displayed. For example, use this option if you want only the Address Book and Calendar windows open, without their following windows open. Open the windows you want using the Window menu or the icons on the icon bar, and then tile the windows using the Window > Window Management > Tile feature. Of course, you can manually size any window.

You can also control such things as the colors, fonts, and grid lines in your windows. The Window > Window Settings > Set Color and Window > Window Settings > Set Font menu items allow you to do so.

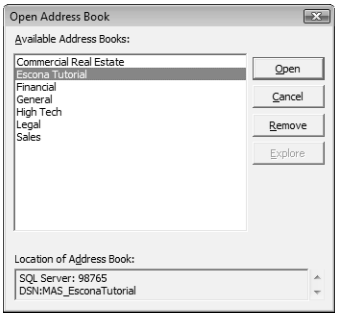
Opening an Address Book

Address Books can be opened in Administrator or Maximizer. There are no conflicts if you open an Address Book while it is being used by other users.

If you are running Maximizer CRM Group Edition (or MaxExchange Remote is installed), you must specify whether to access local or global Address Books in the drop-down list that is provided. A local Address Book is located on your own computer, while a global Address Book is located on a server computer other than yours. Use the global setting to access shared Address Books.

➤ To open an Address Book

1. Select **File** > **Open Address Book**.
2. If the option is available, select **Local List** or **Global List.**



3. Select the **Address Book** to open. The Login dialog box appears.
4. Type your **password** and click **OK**. The name of the Address Book appears in the application title bar.

   Under certain operating system configurations, your password may expire after a period of time. In this case, Maximizer will prompt you to change it. See your system administrator for more information.

The default password for new users and for the users in the sample Address Books is "maximizer".

➤ To log into the current Address Book as another user

1. Select **File** > **Login** or double-click in the **Users** section of the **Maximizer status bar** at the bottom of the window. The Login dialog box appears.
2. Enter a **user ID** and **password**.
3. Click **OK**.

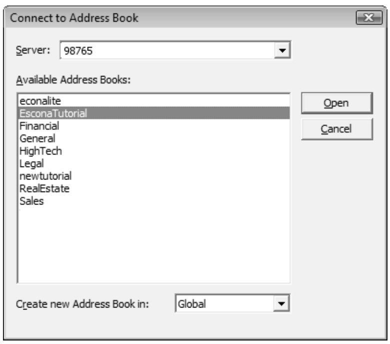
Connecting to an Address Book

Maximizer allows you to connect to any shared Address Book on another computer. The computer can be a Maximizer workstation or a server. Once you have connected to an Address Book, you can access the Address Book from the Open Address Book dialog box.

ⓘ You can perform this procedure if you have Maximizer CRM Group Edition installed.

➤ To connect to an Address Book

1. From Maximizer, select **File > Connect to Address Book**.
2. In the **Connect to Address Book** dialog box, select the computer that hosts the Address Book to which you would like to connect.
3. Select an Address Book from the **Available Address Books** list and click **Open**.



4. When you connect to the Address Book, you are prompted with a message saying the connection was successful. Click **OK** to close the message dialog box.

   Once the connection to an Address Book is established, it appears in the Open Address Book dialog box. You can use the Remove button in the Open Address Book dialog box to remove it from the available Address Book list.

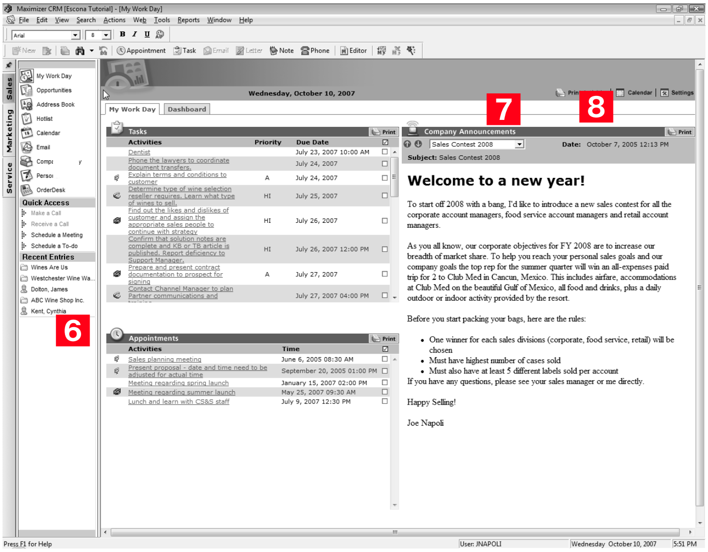
My Work Day View

The My Work Day view is an area where everyone in your company using Maximizer can see Hotlist tasks, appointments, company announcements, and Dashboard.

Adjust the My Work Day View

You can adjust the My Work Day view to suit your own preferences.

➤ To adjust the My Work Day view



1 Use the icons to access the main windows in Maximizer. The tabs along the side of the icon bar represent the various modules. Depending on what tab you have selected, the icons change. You can minimize the size of the icon bar by clicking on the pin graphic. When the icon bar is minimized, click on the pin graphic again to expand the icon bar.

2 Click the Dashboard tab to open the Dashboard. For more information, see "Working with Dashboard" on page 29.

3 To display an announcement, insert the announcement as a note, or as a text or an HTML document in the Company Announcements folder in the Company Library. You can then select the announcement for display in the page from the drop-down list. You must select **View** > **Refresh** or press the F5 key before the announcement is visible in the list.

ⓘ Although any user can add a document to the Company Announcements folder, you must be part of the Company Announcement Authors security group before your document is visible in the announcements list.

4 To view a different company announcement, select an **announcement** from the drop-down list.

5 To turn off Company Announcements, Activities and Appointments, or Dashboard, click the **Settings** button.

6 Use the **Quick Access** section to perform common tasks. The **Recent Entries** section displays the most recently used Address Book entries. Click on an entry to make it current.

7 Use the **Print** and **Print Activities** buttons to print tasks, appointments, activities, and company announcements for the day.

8 To switch to another calendar day in the My Work Day view, click the **Calendar** button.

Working with Dashboard

Dashboard can be accessed on the road through Maximizer Web Access. For more information about setting up Dashboard, see the *Maximizer CRM Administrator's Guide*.

Designed for executives and upper management, Dashboard shows up-to-the-second indicators of your company's performance. Like a car's dashboard, Dashboard's indicators monitor daily activities and events in real time, so you can see at a glance which areas are doing well and which areas need attention. Information such as how many visitors are currently on your website, how many opportunities are in the pipeline, and your daily revenue from online purchases may be accessed instantaneously.

Some of the indicators you can choose from include:

- Daily Address Books added
- Daily Web Orders
- Daily Web Sales
- Pipeline Reports
- Lost Opportunities
- Won Opportunities
- Value of Opportunities in Progress

With this type of information on your screen at all times, you can see in a glance how your company is doing and even see the indicators register activity from moment to moment.

For important indicators, such as daily lost or won opportunities, you can configure Dashboard to notify you with an alarm when the indicator passes a certain mark. This helps to notify you when a critical situation has occurred that requires your attention, or when you surpass a goal that you set for your team.

View Dashboard

If the Dashboard tab is not displayed, click the Settings button and ensure that the Show Dashboards checkbox is selected.

To access Dashboard, click the Dashboard tab in My Work Day. If the dashboard you want to view is not displayed, select it from the drop-down list. Note that you can access Dashboard only if your system administrator has added you to the Dashboard Users security group.

The Dashboard window displays an array of indicators. In some dashboards, the indicators are grouped into sections such as Opportunity Status, Pipeline, and Revenue. When customizing a dashboard, you can select which indicators to display.

If you want only Dashboard to display in My Work Day, click the Settings button and deselect the Show Tasks and Appointments checkbox and the Show Company Announcements checkbox.

Customize Dashboard

Dashboards may contain toolbars that allow you to customize Dashboard properties. For example, the dashboard templates contain toolbars with Open, Save As, Save, Properties, and Refresh buttons. Use these buttons to add or remove indicators and change indicator properties.

Dashboard HTML files reside in the Dashboards folder in the Company Library. These files reference the .KIN files that specify Dashboard properties.

Toolbar display is controlled by settings in the dashboard's HTML file. If the file contains the parameter "ShowToolbar=No", a toolbar is not displayed, so you cannot customize the dashboard. For more information, see "Customizing Dashboard" in the *Maximizer CRM Administrator's Guide*.

The following sections show you how to customize dashboards, where applicable.

Select Dashboard Indicators

What do you need to know on a minute-to-minute basis? Do you want a single gauge of your daily web sales, or a dashboard with as much information as the space shuttle's control panel? Dashboard can show you as many—or as few—indicators as you need to see.

➤ To select indicators

If Dashboard is sectioned, click the Properties button in the section in which you want to adjust properties.

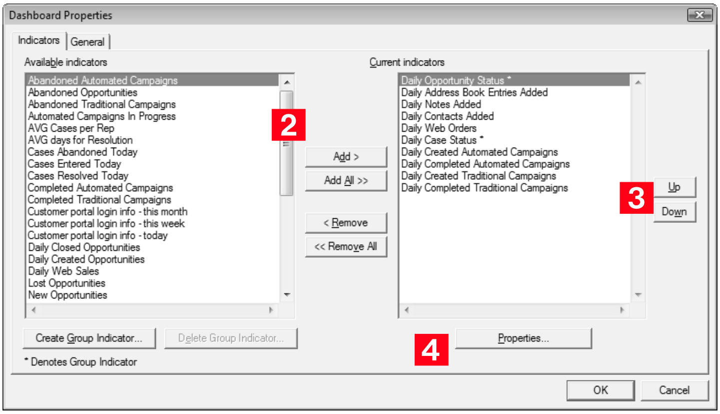
1. Click the **Properties** button.

2. To add an indicator, select it from the **Available Indicators** list and click **Add**. To remove an indicator, select it from the **Current Indicators** list and click **Remove**.

You can also drag and drop a gauge directly in the dashboard to change its position.

3. Use the **Up** and **Down** buttons to move the selected indicator up or down in the list. The order of indicators in this list represents their order in Dashboard.

4 Click **Properties** to customize the selected indicator. For more information, see “Set Indicator Properties” on page 32.



5 Click **OK**.

6 Click the **Save** button to save your changes.

Set General Properties

The General tab in the Properties dialog box allows you to set general properties. You can:

- Specify how frequently Dashboard updates the indicator values.
- Change the background color.

The General tab also displays the name of the current .KIN file. This file contains your dashboard configuration. Your customizations are saved to this file.

➤ To set general properties

1 Click the **Properties** button and click the **General** tab.

2 Enter a value in the **Update every** box.

3 Click the arrow to select a different background color.

4 Click **Apply**. Click **OK**.

5 Click the **Save** button to save your changes.

Create Group Indicators

You can create group indicators that display data from a number of existing indicators in a chart. There are two types of group indicators: bar charts and pie charts. You can include any of your existing indicators in a group indicator.

➤ To create a group indicator

1. Click the **Properties** button.
2. Click **Create Group Indicator**.
3. In the **Name** field, enter a descriptive name for the indicator. You can also enter a description for the indicator.
4. In the **Indicator type** drop-down box, select **Bar Chart** or **Pie Chart**.
5. In the **Indicators** tab, select the indicators that you want to group together. Select any existing indicator in the **Available indicators** area and click **Add** to move the indicator to the **Selected indicators** area.
6. Select the style of the indicators. You can choose gradient colors or solid colors.
7. Choose a color for each selected indicator. In the **Selected indicators** area, select an indicator. In the **Style for selected indicator** area, select a color for the indicator.
8. In the **Settings** tab, adjust the color, font and layout settings. For bar charts, you can also change the gadget settings.
9. Click **OK** to save the properties of the group indicator.

You can add the group indicator to your dashboard in the same way that you add any other indicator. See "Select Dashboard Indicators" on page 30 for details.

Set Indicator Properties

As described in "Select Dashboard Indicators" on page 30, you can set indicator properties in the Properties dialog box. You can also right-click an indicator to quickly and easily set its properties.

Select the Indicator Type

For each indicator, you can select which type of indicator will be used to display the information. Although your selection of indicator types depends on your installation of Dashboard, six common indicator types are:

Angular Gauge – A “speedometer” style needle gauge.

Linear Gauge – A horizontal graphical gauge with a “needle” to indicate the value.

Numeric LED – A digital readout with the appearance of LED display (like a digital alarm clock). Note that if the value exceeds 99,999 then this type of gauge displays numbers in scientific notation (“E”).

Numeric Gauge – A gauge indicator with numbers indicating value.

Thermometer – A graphical thermometer indicating value.

Color bar – A bar shaped graph indicating value by the color bar.

➤ To select an indicator type

1. Right-click the **indicator** you want to adjust. The properties dialog box for the indicator opens.
2. On the **Indicator Type** tab, select a type from the **Indicator Type** drop-down list.
3. To change the scaling of the indicator, enter a value under **Each unit is equivalent to**.
4. Click **Apply**. Click **OK**.
5. Click the **Save** button to save your changes.

Set Alarm and Target Levels

An indicator alarm is useful if you need to be notified when one of your indicators passes a certain level. If the number of lost opportunities gets too high, for example, you would probably want to be notified.

The alarm level determines when the alarm is activated. It also sets the redline in linear gauges.

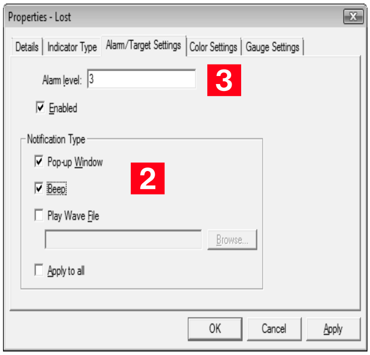
An alarm is not necessarily like an alarm clock—you can be notified of an alarm with:

- A pop-up message
- A beep
- An audio file (Windows .WAV format)
- All of the above

You can also set a target level if an indicator is a color bar or a thermometer. When you set a target level, the indicator displays an arrow that points to the set value. If the alarm is enabled, it will be triggered when the target level is reached.

➤ To set alarms and notification types

1. Right-click on an indicator and select the **Alarm/Settings** tab.
2. Choose how you want to be **notified**. If you have a sound file that you like, you can browse and select it.
3. Enter the **level** at which to trigger an alarm. This also sets the "redline" for linear gauges.



You can find some .WAV files in the "Maximizer\MaData6" folder.

4. Click **Apply**. Click **OK**.
5. Click the **Save** button to save your changes.

➤ To set a target level

1. Right-click on a color bar or thermometer indicator and select the **Alarm/Settings** tab.
2. Enter a value in the **Target level** box.
3. Click **Apply**. An arrow pointing to this value is added to the indicator. Click **OK**.
4. Click the **Save** button to save your changes.

Personalize Your Indicators

Dashboard has many options for customizing the appearance of your indicators and the Dashboard window.

➤ To personalize indicators

1. Right-click on an indicator and select the **Color Settings** or **Gauge Settings** tab.
2. Adjust the **color settings** and **gauge settings** on the corresponding tab.

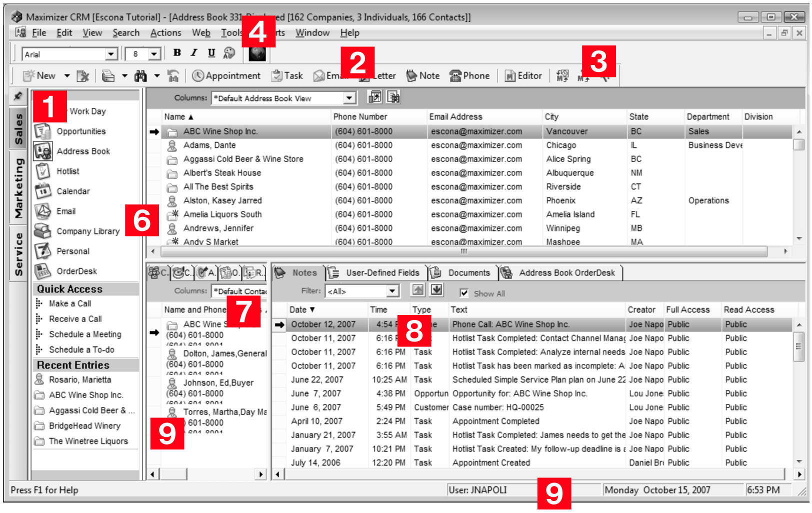
Main Address Book Window

Maximizer is a list-based module, which means that all of the information it accesses is displayed in rows and columns. Lists make it easy to see many entries at once and customize your views.

Address Book Window

You can view a Contact in the main Address Book window by selecting a Contact and choosing View [Contact] in Address Book from the Search or shortcut menu. You can also select multiple Contacts and select the corresponding menu option from the Search or shortcut menus to view the entries in the Address Book window.

Typically, most of your activities are done in the Address Book window.



➤ To work with the Address Book window

1. Use the button with the pin graphic on it to hide or display the icon bar view.
2. There are menu options for all tasks you can perform in the Address Book window and toolbar buttons are available for common tasks.
3. Maximizer wizards are available to help you through tasks such as creating appointments, Hotlist tasks, strategies, and web forms.
4. The status indicator shows you when the module is busy when doing tasks such as searches.
5. The **Sales**, **Marketing**, and **Service** tabs provide easy access to the related windows through the icon bar. A Quick Access section is also available for common tasks. The Recent Entries section displays your most recent entries.
6. Icons representing Companies, Individuals, Contacts, Company Sales Leads, Individual Sales Leads, and Contact Sales Leads differentiate the types of entries.
7. Tabbed following windows display information and attached entries for the selected entry in the main window.
8. The view bars in a window or following window contain a view filter and buttons for common tasks and the column setup. You can also use the arrow buttons to move from one entry to the next.
9. The status bar displays help on the item your mouse pointer is over, and shows the current user, the date, and the time.

As you work with Maximizer, you will learn to use the many time-saving features. To open one of the Maximizer windows, click an icon in the icon bar or select an item from the Window menu. If you are not sure what a button or icon does, hold your mouse pointer over it to see a "tooltip"—a short description. The status bar also helps you with descriptions of buttons, icons, and menu commands.

Toolbars and the Quick Access section of the window give you quick access to frequently used menu commands. You can display only the toolbars you want or even create your own custom toolbars.

Some functionality is common to both Maximizer and Administrator. For example, adding user-defined fields and adding users can be done in both programs. Please refer to "Administration for Maximizer" on page 487 for more information. You can also refer to the Maximizer and Administrator Help and the *Maximizer CRM Administrator's Guide* for more information.

If you have the Maximizer Customization Suite installed, you can use the Interface Customization application to customize Maximizer menu labels, window captions, and icons. For more information, please refer to the Maximizer CRM Customization Suite documentation.

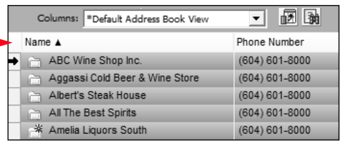
Select Address Book Entries

There are different ways to select Address Book entries.

➤ To select Address Book entries

- To select an Address Book entry, click on the gray box to the left of the entry. To select multiple entries, click on the entries one at a time while holding down the Control key. Or select an entry and, while holding down the Shift key, select another entry, selecting all entries in between the two you initially selected. To select all entries in the current view, click the **gray box** in the upper-left corner of the Address Book window.

Click this box to select all entries in the current view.



Adjust the Icon Bar

You can adjust the icon bar properties and also choose the state of the icon bar's visibility.

➤ To adjust the icon bar

1. Select **Toolbars** from the **View** menu, or right-click in the toolbar area and select **Customize** from the shortcut menu. The Toolbars dialog box appears.
2. Select **Icon Bar** and click **Properties**.
3. Set your defaults in the **General** group box:
   - Select the **Visible** option to display the icon bar in the Maximizer window.
   - Select the **Show module tabs** option to display the Sales, Marketing, and Service tabs.

     If you deselect this option, the tabs are hidden. By default, the icons for the current module are displayed. To select a different module, click the drop-down arrow.

- Select the **Display tooltips** option to show information about each icon when you pass the mouse pointer over it.
- Click **Color** to change the background color of the icon bar.

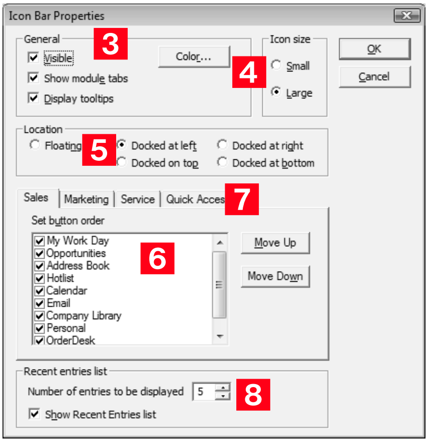
4 Set the icon size to **Small** or **Large**.

5 Set the location of the icon bar. The **Floating** option allows you to place the icon bar anywhere inside the Maximizer window. The **Docked** option places the icon bar on a border of the Maximizer window.

6 On each of the **Sales**, **Marketing**, and **Service** tabs, select the icons you want to be displayed. Use the **Move Up** and **Move Down** buttons to position the icons.

7 Click **Edit** on the **Quick Access** tab to add or remove commonly performed tasks displayed in the Quick Access section. To hide the section, deselect the **Show Quick Access list** option.

8 Set the number of entries to be displayed in the **Recent Entries** section. To hide the section, deselect the **Show Recent Entries list** option.



Customizing Maximizer Toolbars and Toolbar Buttons

To change the properties of an existing custom toolbar or toolbar button, select View > Toolbars, select the custom toolbar and click Customize. You can then select a specific button to modify its properties.

From a Maximizer custom toolbar you can perform specific actions such as launching another application or performing a specific search that was saved in your search catalog.

➤ To create or modify a custom toolbar

1. Select **View** > **Toolbars** from the menu.

   – or –

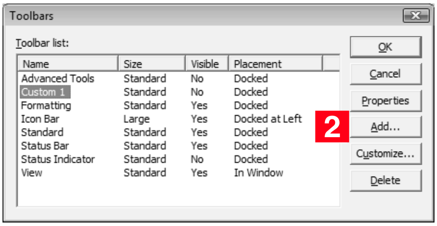
   Right-click in any frame containing a toolbar and select **Customize** from the shortcut menu.

   The Toolbars dialog box appears.

2. To create a new custom toolbar, click **Add**.

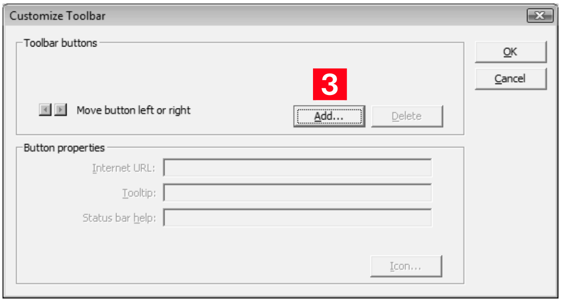
   – or –

   To add a button to an existing custom toolbar, select the existing custom toolbar, and then click **Customize**.



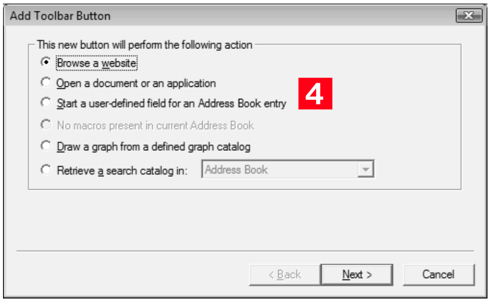
   The Customize Toolbar dialog box opens.

3. Click **Add**.



   The Add Toolbar Button dialog box appears.

4 Under **This new button will perform the following action**, select one of the following options, and then click **Next**.



- **Browse a website**

  To add a button to browse a specific website or website document (usually beginning with http:// or www), select this option.

- **Open a document or an application**

  To add a button to start an application such as a word processor, spreadsheet, graphics program, or to open a specific document or file, select this option.

- **Start a user-defined field for an Address Book entry**

  This option enables you to set up a relationship between an alphanumeric user-defined field and a toolbar button. When the toolbar button is clicked, the value of the specified UDF is treated as the fully qualified name of a document or an application that is to be started (opened).

- **Run a Maximizer macro**

  To add a button to run a Maximizer macro, select this option. This option is grayed out if no macros are present in the current Address Book.

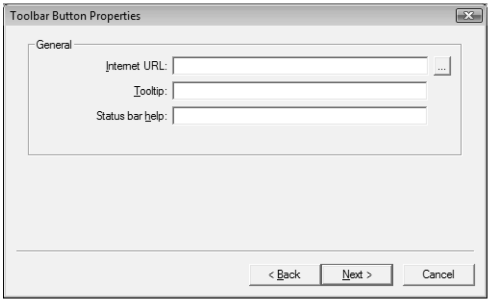
- **Draw a graph from a defined graph catalog**

  To add a button to run a graph that has been saved in the graph catalog, select this option. The option is grayed out if no graphs have been saved in the catalog.

- **Retrieve a search catalog in [window]**

  To add a button to perform a search that has been saved in the search catalog, select this option. Also choose the window to which the search pertains from the drop-down list. For example, if you have created a search catalog entry for searching in the Opportunities window, select Opportunity.

5. If you have chosen to **Browse a website** or **Open a document or an application**, click **Next**, and type the path of the document/application or web address (URL). Or, click **Browse** to locate the document/application or URL to run. If you would like an application to open a specific file, make sure that the application path is enclosed in double quotes and put a space after the path of the application. Then click **Next**.

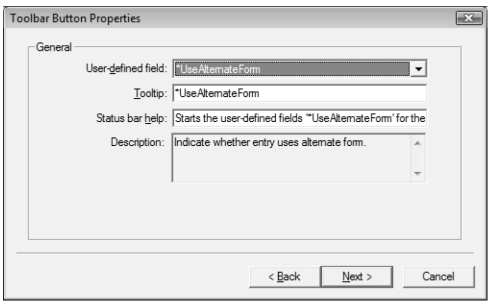


For example, to launch WordPad and open the file Notes.txt, in the Document/Application text box type the following:

"C:\ProgramFiles\Accessories\WordPad.exe" C:\Notes.txt

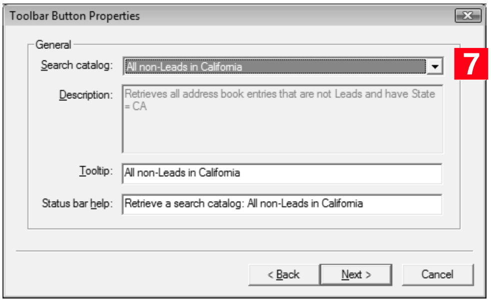
To load a new instance of an already running program, click the **Load new instance** checkbox.

6. If you have chosen to **Start a user-defined field for an Address Book entry**, **Run a Maximizer macro**, or **Draw a graph from a defined graph catalog**, click **Next**, and select it from the drop-down list. Then click **Next**.

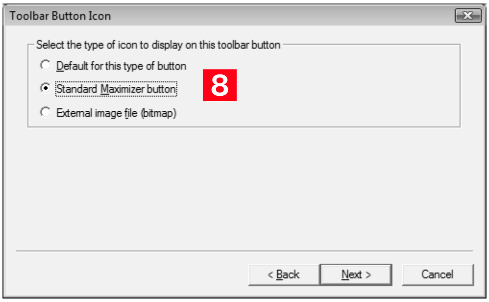


The lists contain all user-defined fields, macros, and graphs in the current Address Book.

7 If you have chosen to **Retrieve a search catalog**, select the search catalog from the drop-down list in the Toolbar Button Properties dialog box, click **Next**, and then edit the **Tooltip** and **Status Bar Help** text if you wish. Then click **Next**.

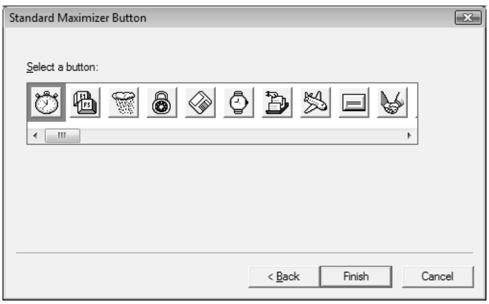


8 Select the type of button you would like to display in the toolbar, and then click **Finish** or **Next** depending on the option you chose.

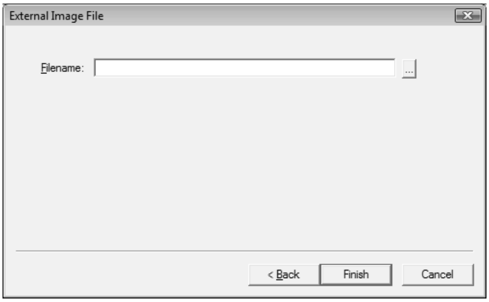


If you choose to display the default button, Maximizer will select the button automatically and you may go on to step 11.

9 If you choose to use a **Standard Maximizer button**, select one of the available buttons.

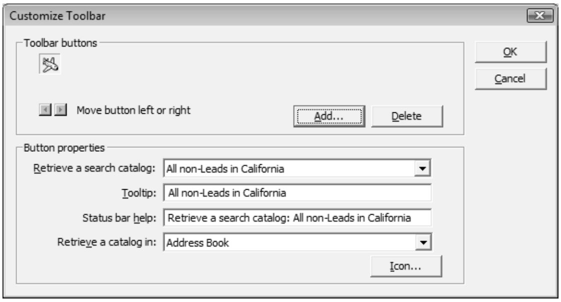


10 If you choose to use an **External image file (bitmap)**, locate the image using the **Browse** button.



11 Click **Finish**.

12 If desired, change the position of the new button on the toolbar using the arrows.



13 Click **OK** and then click **OK** again to close the Toolbars dialog box.

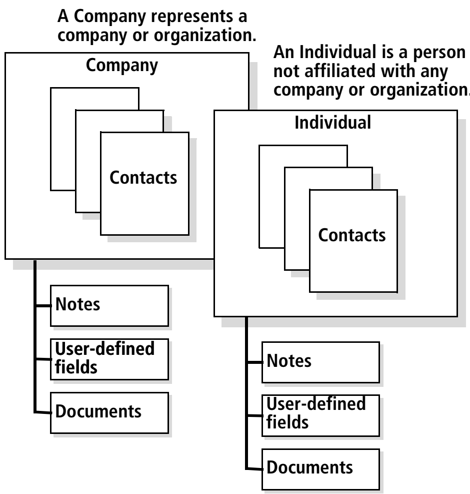
Keeping Track of Your Prospects and Customers

Maximizer's focus is on Address Book entries—Companies, Individuals, and Contacts. Address Book entries can also be designated as sales leads to help you organize your information.

The Address Book window gives you the ability to manage your daily activities with companies, and the people who work for them. In addition to the basic Address Book information, including addresses, phone numbers, and email addresses, you can record other important information, such as relationships between companies or extra details, like the business type.

As you work with the Address Book entries in your Maximizer Address Book, you can keep notes on your activities, so you can always have a history of your activities with your customers.

Company and Individual type Address Book entries contain Contacts (people associated with a Company or Individual). You can attach notes, user-defined fields, and documents to Address Book entries.



Add Address Book Entries to Your Address Book

Typically, "Company" entries represent a corporate entity you would like included in your Address Book. "Individuals" represent a person who is not affiliated with a company or organization. "Contacts" are entries that are always associated with Companies or Individuals. "Address Book entries" refers to all Companies, Individuals, and Contacts in your Address Book window.

If you need to add people to your Address Book, add them as Individuals or as Contacts of an Individual or Company. If you need to delete a Contact, its associated notes and documents are automatically transferred to the "parent" Company or Individual, which ensures you maintain a record of all interactions with a company, even during changes.

➤ To add an Address Book entry

Note that the type of entry you are creating determines its available Key Fields.

1. To add an Address Book entry, click the **arrow** button next to the **New** button on the toolbar and select one of the options. You can also right-click in the Address Book window and choose an option from the Add menu. If you choose to add one of the lead options, the Sales Lead field is selected by default on the Basic Information tab.

   To add a Contact for an entry, select the Company or Individual to which the Contact will belong. In the Contacts window, press Insert or right-click and select Add Contact. Alternatively, you can press the New button or right-click in the Address Book window to add a new Contact.

2. Enter the name, the mailing address details, website, phone numbers, and email addresses as required. Phone number and email address description types are entered in the field on the left of the number or address.

   To enter an alternate address for the entry, click **Address**. To use an alternate address as the default address, select it in the Mailing Address dialog box and click the Select button.

Mandatory user-defined fields and Key Fields are set up in Administrator.

3. Select the **Key Fields module** and specify a value for the **Key Fields**. These are commonly used fields that are specific to your company.

   Up to eight key fields can be specified for the various Address Book entry types (lead and non-leads), opportunities, campaigns, and customer service cases. Key fields are set up in Administrator—they will not appear in Maximizer unless they have been specified. For more information on key fields, refer to “Use Key Fields” on page 494. You can also refer to the *Maximizer CRM Administrator’s Guide* if applicable.

You have the option of opening Address Book entries in view mode or edit mode. This setting is controlled in the Address Book window Preferences dialog box (click the Preferences button). You can also control this setting in the System Defaults preferences tab.

4. Enter the Address Book entry details (**Company Details**, **Individual Details**, or **Contact Details)** such as the Address Book entry **Category**. Click inside the field on the right and then click the ellipsis button for access to the possible field values. If this entry is marked as a **Sales Lead**, and you would like the entry accessible to a **partner**, make sure you set the category to partner.

5. You can click the **Print** button to print an Address Book entry report.

If you are in view mode in the Address Book entry dialog box, you can click the **Copy** button to quickly copy the text to your clipboard so you can paste it into other documents.

6. You can click the **Favorite List** button to see which Favorite Lists to which the entry is assigned. This button also provides you with a way to quickly remove the entry from a Favorite List or add the entry to a Favorite List.

7 You can click the **Properties** button for access to information such as the creation date and Address Book entry identification number.

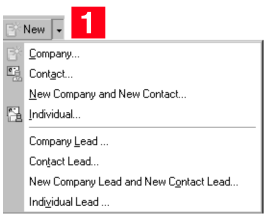
8 You can perform common tasks associated with the Address Book entry by clicking the **Actions** button.

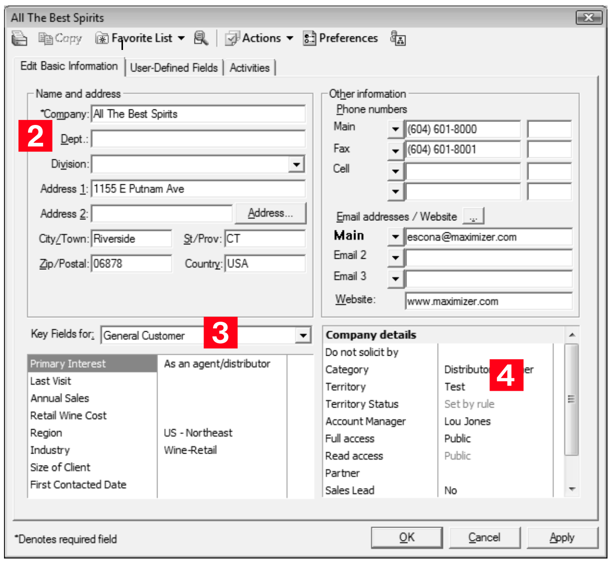
9 You can click the **Preferences** button to set the default for opening an Address Book entry to View or Edit mode. You can also set your preference for the mailing address format.

To view an Address Book entry's properties, select the entry, right-click, and select Properties.

10 Click the **User-Defined Fields** tab and fill in any associated user-defined fields. Make sure you select the field and then click inside the field on the right to access the possible values for the field.

Selecting the **Show Blank Fields** option shows all fields in the Address Book, not just those with values defined for the Address Book entry.





Create a Default Address Book Entry

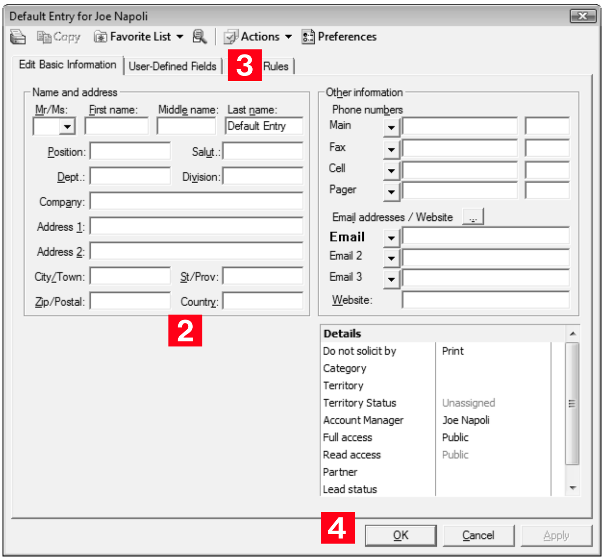
Default entries are user-specific so each user in the Address Book can have different default entries.

Creating a default entry provides you with some fields that are already filled in when you create a new Address Book entry. Default entries are useful if you often enter many fields in common, such as the same city or country. Each user in an Address Book can have a unique default entry.

If you are logged in as the MASTER user (or have the Administrator user role), you can edit multiple default entries at once. Select View > Default Entries for All Users, then select the entries you would like to edit, and select Edit > Global Edit.

➤ To create a default Address Book entry

1. In the Address Book window, select **Default Entry** from the Edit menu. The Default Entry dialog box appears.
2. Fill in the fields to include as default information.
3. Click the **User-Defined Fields** tab to include specific fields in the default entry.
4. When you are finished, click **OK**.



If you modify the default entry in Maximizer Web Access, the changes will appear in Maximizer. The most recent changes to the default entry, regardless of where it was modified, appear in both applications.

Now, when you create a new Company or Individual, the entry screen appears with the default fields already filled in. The default entry affects all the new Address Book entries you create.

Change Several Address Book Entries with Global Edits

You can update a number of Address Book entries at the same time with the Global Edit command. For example, you may want to add a FAX Phone extension to several entries. Global Edit is a very powerful feature, so you might consider making a backup of your Address Book before making significant changes using Global Edit.

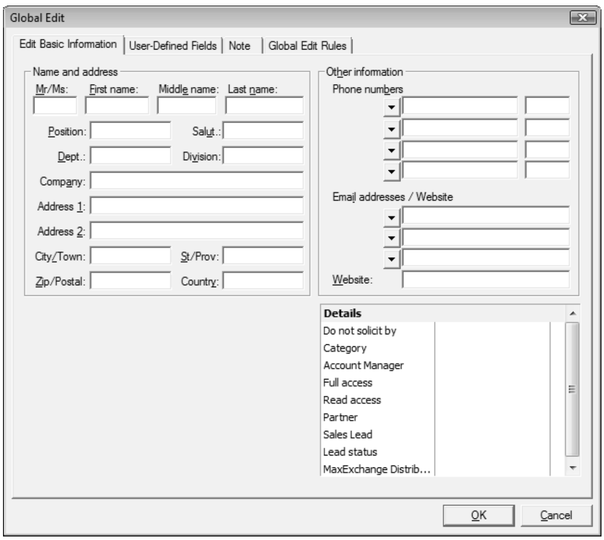
➤ To perform a global edit

1. In the Address Book window or Contacts window, select the entries you want to modify.
2. Select **Global Edit** from the **Edit** menu. The Global Edit dialog box appears.

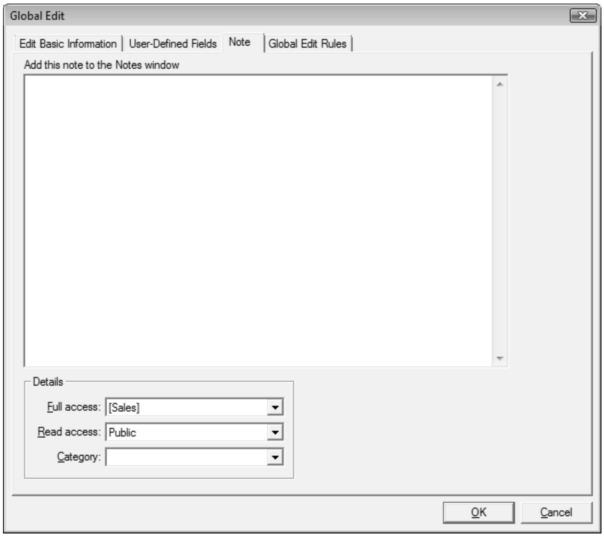
? For detailed information, see F1 Help. Also refer to Maximizer Help for information on applying global edits to user-defined fields.

Apply your edits to the Basic Information or User-Defined Fields tabs. Changes made to these tabs are applied in the same way as when you are entering an Address Book entry. The changes are applied to all Address Book entries included in the global edit. If you do not select any entries, the edits are applied to all your entries in the current list.

You can also select **Remove** for most fields in the Edit Basic Information tab. This option lets you remove existing values for a field without specifying alternative values.



3 Click the **Note** tab and add a description for the global edit. This adds a note to each of the affected entries. You can also specify the **Access Rights** for the default note and a **Category** (categories are created in Administrator preferences).



4 Click the **Global Edit Rules** tab.

5 Under **Mailing Rules**, set the mailing address options. You can specify Do not change, Yes, or No for each of the options.

- The **Receives Mail Sent to Company or Individual** option applies to Contacts. Select it if you want to send mailings to the associated Contacts when sending mail to the Company or Individual.
- The **Use Address Book Entry's Name in Mailing Address** option lists the Address Book entry name as well as the Contact name (if applicable) in the mailing address.

These options apply to table user-defined fields in the User-Defined Fields tab and in the Edit Basic Information tab (Details list).

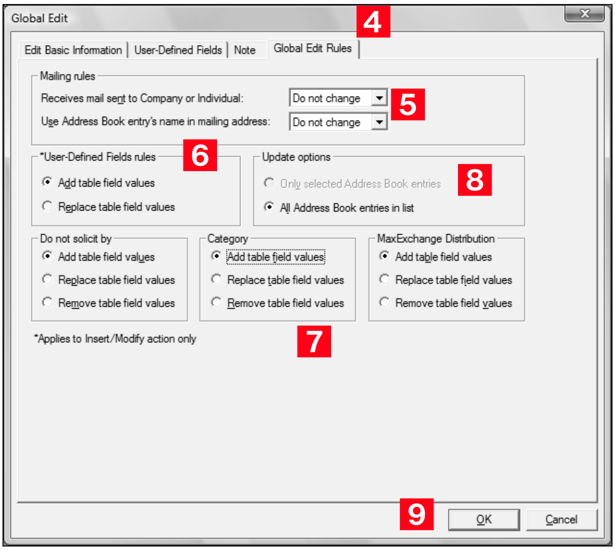
6 Select the appropriate item in the **User-Defined Field Rules** group box. The options in this group box apply only to table user-defined fields. To replace the current user-defined field values with a new list, select Replace Table Field Values. To add new table user-defined field values to existing values, select Add Table Field Values. Note, however, that if the table user-defined field is "single-value only", the Add Table Field values option does not apply. The new value always replaces the existing one.

7 Select the appropriate items in the **Do not solicit by**, **Category**, and **MaxExchange Distribution** group boxes. These options apply to the three fields with the same names in the Details area of the Edit Basic Information tab.

- To add the selected values to the existing values, select **Add table field values**.
- To replace the existing values with the selected values, select **Replace table field values**.
- To remove the selected values from the existing values, select **Remove table field values**.

8 Select the appropriate item in the **Update Options** group box. This option applies only if you have entries selected in your Address Book window.

9 Click **OK** to perform the global edit. You are prompted with a message to verify that you want to continue with the operation.



View Address Book Entries

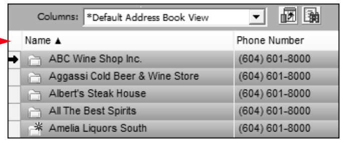
After entering your search criteria and clicking OK, the entries that match the text you entered are displayed in the Address Book window.

➤ To view and modify Address Book entries

1 To view the details of an Address Book entry, click on the entry to open it.

2 To select multiple entries, click on the entries one at a time. To select all entries in the current view, click the **gray box** in the upper-left corner of the **Address Book** window.

Click this box to select all entries in a list.



Use Column Setups to Organize Lists

Maximizer provides a selection of column setups you can use for the the Address Book, Opportunities, Campaigns, Customer Service, and Hotlist windows. You can also create your own column setups. This allows you to display different fields in various combinations.

➤ To create a column setup

1 Select **Column Setup** from the **View** menu or click the **Column Setup** button on the **View** bar.

2 In the **Column Setup** dialog box, click **Add**. The **Defined View Properties** dialog box opens.

3 Type a **Name** in the **Details of View** group box.

4 Select an option from the **Full Access** drop-down list.

If you leave **Public** selected, all users can modify or delete the column setup. If you select a group or user, only members of that group or that particular user can perform these actions.

5 Select an option from the **Read Access** drop-down list.

If you leave **Public** selected, all users can see and use the column setup. If you select a group or user, only members of that group or that particular user can see and use the column setup.

6 Click a column header in the **Columns in View** group box.

7 Click the **Properties** button to modify the column title or width. In the **Column Properties** dialog box, modify the **title** and/or **width** and click **OK**.

8 Click the plus symbol to expand a fields folder and select a field in the **Available Fields** list.

9. Click **Add** to add it to the current column. Fields in the current column appear in display order in the Selected Fields list.
10. Change the name of the field label in the **Field Label** field if necessary. Optionally, you can select field separator characters from the drop-down list such as commas, spaces, blanks, or dashes to conserve space and place multiple fields on the same line.
11. Repeat steps 6–10 for each field to add to the column setup.
12. Click **OK** to save the column setup.

➤ To use a column setup

- Retrieve a column setup for use with the current window by selecting **View** > **Column Setups**, selecting the column setup view, and clicking **Use Now**.

Record Relationships with Related Entries

? Press F1 in the Related Entries window for more information on related entries.

In the course of business, it's common to have people and companies who are somehow related or connected to each other. For example, one of your contacts might be another's accountant. Maximizer allows you to record these types of relationships in the Related Entries window.

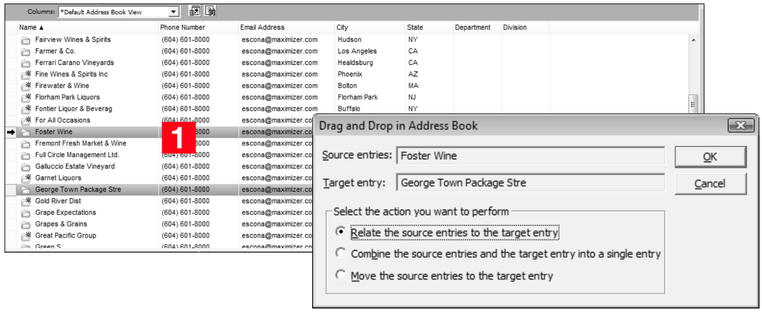
➤ To relate two entries

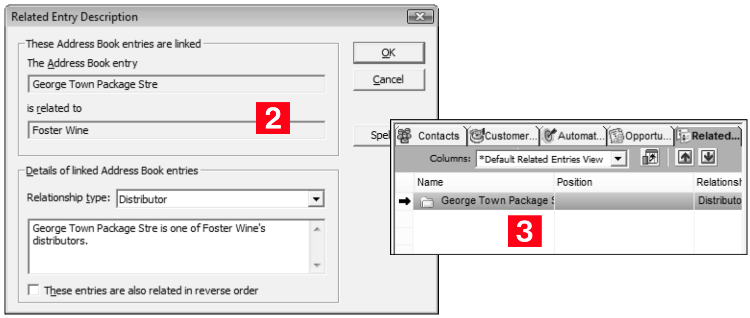
1. Select the two entries you wish to relate to each other and select **Edit > Relate Entries**.

   – or –

   Drag an entry and drop it on to another entry. In the resulting dialog box, select **Relate the source entry to the target entry**.
2. Specify the nature of the connection between the two entries.

3 Each entry appears in the other's Related Entries window.





Any Address Book entry can be related to another. All notes, user-defined fields, and documents associated with a related entry are then linked to the relationship. If an Address Book entry has entries related to it, these are displayed in the Related Entries window.

➤ To unlink Address Book entries

- Occasionally, relationships that you set up between two Address Book entries will change, and you will want to remove the relationship. You can "unlink" two entries by selecting one of the related entries in the Related Entries window and selecting **Edit > Unlink Selected Entries**.

Convert Individuals to Companies and Contacts to Individuals

If you originally created an entry as an Individual and now decide the entry would be more appropriate as a Company with Contacts, you can convert the entry.

In the conversion, Maximizer copies the entire contents of the Individual to a new Company entry—all data is converted, including the Individual's Contacts. The original Individual is automatically deleted in the process.

Additionally, you can convert Contacts to Individuals. You are asked to confirm if you want the new Individual to inherit the Contact's address. All data is transferred to the new Individual entry and the original Contact is automatically deleted.

Any number of Contacts or Individuals can be converted at once.

➤ To convert Address Book entries

- To convert Individuals to Companies, select the Individuals you want to convert and select **Edit > Convert Individuals to Companies**. To convert Contacts to Individuals, select the Contacts you want to convert and select **Edit > Convert Contacts to Individuals**.

Using Territory Management

Use Territory Management to set up territories and assign them to Company and Individual Address Book entries. You can assign the territories manually, or automatically through the application of territory rules.

The Sales Manager user role is set on the Access Rights tab of the User Properties dialog box. To see your access rights, select File > Users > Properties.

To use Territory Management, you must be a Sales Manager.

However, once territories are created and assigned, any Maximizer user can use the Territory and Territory Status fields in everyday tasks such as searching for entries, adding column setups, inserting merge fields, and creating reports.

You cannot set up or align territories on MaxExchange Remotes and Remote Servers. You can, however, assign territories manually.

Users who are not Sales Managers can manually assign a territory when creating a new Address Book entry. They can also assign a territory to an existing entry if a territory is not assigned and the Account Manager field is blank. When a user assigns a territory, "Set by user" is displayed in the Territory Status field.

Set Up Territories

When you set up a territory, you can define rules that an Address Book entry must match to be assigned to the territory during an alignment. To build the rules, use fields such as City, Country, State/Province and Zip/Postal Code. You can also use user-defined fields.

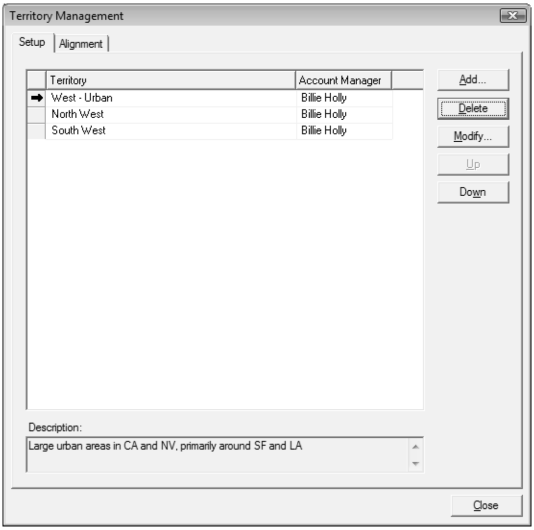
During an alignment, entries are tested against territories in the order the territories appear in the Territory list. If an entry matches the rules of more than one territory, the territory appearing higher in the list is assigned to the entry.

All entries match a territory that does not contain any rules. So if you create such a territory, it is placed by default at the bottom of the Territory list. Otherwise, entries matching the rules of territories appearing after it would not be matched to these territories. Instead they would be matched to the territory without rules.

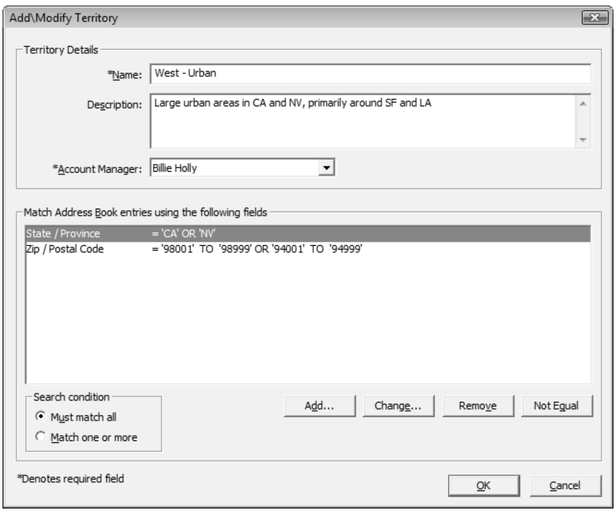
This menu item is available only if you are a Sales Manager.

➤ To set up a territory

1. Select **Edit > Territory Management**. The Territory Management dialog box opens.



2. Click **Add**. The Add\Modify dialog box opens.
3. Enter a territory name and a description of the territory.
4. From the **Account Manager** drop-down list, select an account manager.
5. Click **Add** to select the fields you need to define territory rules.



If an Address Book entry matches the rules of more than one territory, the territory appearing higher in the Territory list is assigned to the entry.

6. Specify whether Address Book entries must match all, or one or more of the territory rules.
7. Click **OK**. The new territory is added to the Territory list.
8. If required, use the **Move Up** and **Move Down** buttons to move the territory in the list.

➤ To modify or delete a territory

1. Select the territory you want to modify or delete.
2. To modify a territory, click **Modify**. Make your changes and click **OK**.
3. To delete a territory, click **Delete**.

Assign Territories

You can assign territories manually on the Edit Basic Information tab, or automatically, on the Alignment tab. If you assign territories automatically by aligning them, they override territories set by Sales Managers only if you select the “Overwrite territories set by manager” option.

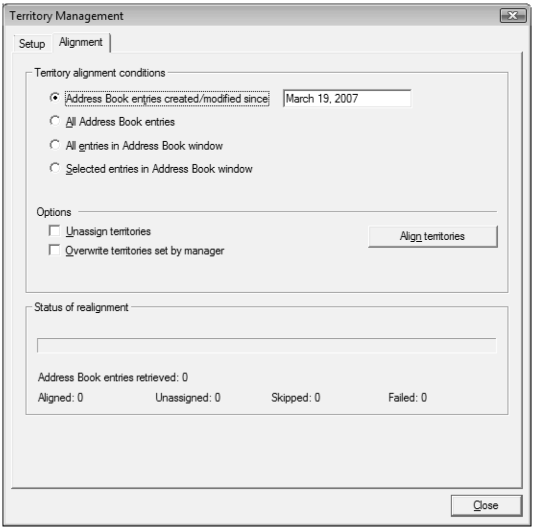
Changes to territory status are logged to the Notes tab.

➤ To assign territories manually

1. In the Address Book window, double-click the Address Book entry to which you want to assign a territory.
2. On the Edit Basic Information tab, click the **Territory** field, and select the territory you want to assign to the entry from the drop-down list. The Territory status field now indicates that the territory was “Set by manager” or “Set by user”.
3. Select an account manager from the **Account Manager** drop-down list.
4. Click **OK**.

➤ To align territories

1. Select **Edit > Territory Management** and select the **Alignment** tab.



? Refer to Maximizer Help for information on specifying alignment conditions and options.

2. Specify the territory alignment conditions. For example, if you want territories aligned for all Address Book entries, select the **All Address Book** entries option.

3. Specify the alignment options.
   - Select **Unassign territories** to unassign territories from Address Book entries.
   - Select **Overwrite territories set by manager** to overwrite territories that were set by Sales Managers.

4. Click **Align territories**.

ⓘ Territories set by users are always overwritten by territory alignments.

If the alignment assigns a territory to an entry, the name of the territory is displayed in the Territory field, and the value "Set by rule" is displayed in the Territory Status field. If no territory is assigned to an entry (and one has not been set manually), the value in the Territory Status field is "Unassigned".

The value "Set by rule (unaligned)" is displayed in the Territory Status field when:

- An entry previously assigned to a territory no longer matches the territory rules. (The rules or the entry have changed.) However, if the entry matches the rules of another territory, it will be aligned to that territory.

- A territory that was set by a user at the time of the entry’s creation does not match the rules of the territory it was assigned to or the rules of any other territory.
- A territory that was assigned to an entry by a Sales Manager does not match any territory rules, and the “Overwrite territories set by manager” option is selected.

Keeping Notes on Your Address Book Entries

Notes are used to record activities associated with Address Book entries, customer service cases, campaigns, and opportunities. The Notes window is a following window, which means it displays notes only for the selected Address Book entry, customer service case, campaign, or opportunity.

Use the Notes window to jot down "manual" notes—your ideas and impressions about a customer, a case, or an opportunity. You can enter manual notes for short company profiles or summaries of contracts and business agreements.

You have the ability to create a default note for the Address Book, Opportunities, Campaigns, Customer Service, and Journal windows. The default note for each window can be different and is specific to the current user. The text automatically appears as part of the note body when you create a new note. The note owner and category can also have default values.

By default, notes are logged for all of the main activities you can perform in Maximizer. Logging can be adjusted on the File > Preferences > Logging tab.

Other note types are automatically created by Maximizer, providing a history of all your email, phone calls, letters, timed notes, opportunities, appointments, tasks, customer service cases, campaigns, and transferred Address Book entries. The note type descriptions are as follows:

- **Customer Service** – Created when you add a case.
- **Email** – Created in the Address Book window when you send an email message to one or more Address Book entries. Email notes are also created when you send a campaign.
- **History** – Created in the Customer Service, Opportunities, and Campaign windows when cases, opportunities, and campaigns are added or changed.
- **Mail-outs** – Created when you print documents, labels, envelopes, or letters using the Maximizer Word Processor's merge feature. Also created when campaign activities are sent out as email, fax documents, or printed documents.
- **Manual** – Added manually to the Notes window.
- **Opportunity** – Created in the Address Book window when opportunities are added or changed. Opportunity notes can be printed or searched only from the Address Book window.
- **Other** – Third-party or custom notes created by your system administrator. Also, notes created by Maximizer's web access sites.
- **Phone calls** – Created when you dial a phone number, or log a received call.
- **Tasks** – Created when appointments or Hotlist tasks are scheduled, modified, deleted, or completed. For Hotlist task

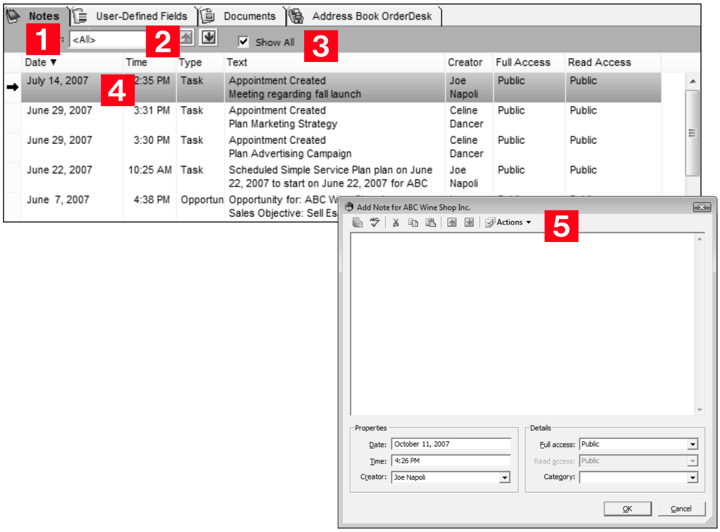
notes, the current owner of the Hotlist task is included in the note, even when a task is reassigned. For appointment notes, details of the appointment are included when the appointment is scheduled and when an attendee list is modified, an additional note is logged.

- **Timed** – Created when you use the Timer.
- **Transfer log** – Created when you transfer entries between Address Books.

➤ To work with the Notes window

1. Use the **Filter** to narrow the entries to a specific note type (e.g.,“Customer Service” or “Email”). Choosing **<Custom...>** enables you to search for notes that contain certain text, notes that were created by a particular user or accessible by a particular user or group, notes in a specific date range, and/or a combination of note types.
2. Use the up and down arrows to view the notes for the previous or next Address Book entry.
3. Use **Show All** to display all notes for a selected Address Book entry. This includes notes belonging to the selected Company/ Individual and all associated Contacts. If this checkbox is not enabled, only those notes belonging to the Company/Individual or the selected Contact are displayed.
4. Double-click an entry to view the entire note. To add a note, right-click in the Notes window or press the **Insert** key.

5 You can perform common tasks by clicking the **Actions** button in the Notes dialog box. You can also spell check your note text.



Select Search > Notes to find any note you want and select Reports > Notes to produce a Notes report. Simply select the types of notes you want in your search or report.

➤ To add a note

1 In a controlling window, drag an entry to the **Notes** window or to the **Note** button on the Standard toolbar.

– or –

From the Notes window, while your entry is selected, right-click and select **Add Note**.

– or –

Double-click a blank note cell.

You can also add a note by copying text to the Windows Clipboard, right-clicking in the Notes window, and choosing Paste Link.

2 In the Add Note dialog box, type your note.

3 Use the **Menu Bar** at the top of the note for various tasks.

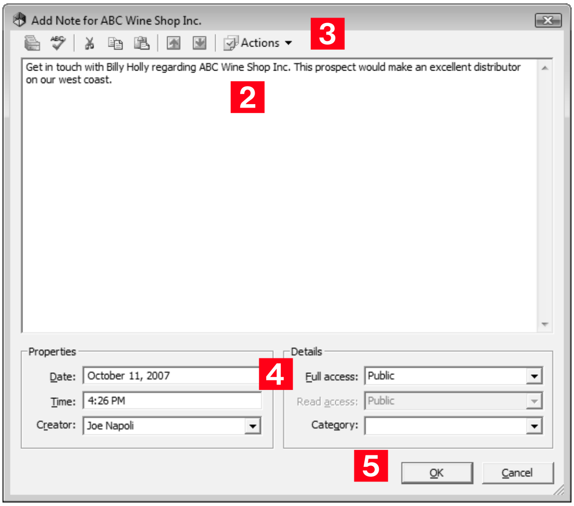
See the mouse-over text or F1 Help for a description of each button. For example, you can check the spelling in your note using the Maximizer Spell Checker. Click the **Spelling** button to initiate the process.

The Category field is available for only manual notes.

4 Adjust the **Date**, **Time**, **Creator**, **Full access**, **Read access**, and **Category**, if necessary. Categories are created in the System Fields tab of the Administrator preferences.

Press F1 for detailed assistance.

5 Click **OK**.



➤ To add a default note

1 In the **Address Book**, **Opportunities**, **Campaigns**, **Customer Service**, or **Journal** windows, select **Default Note** from the **Edit** menu.

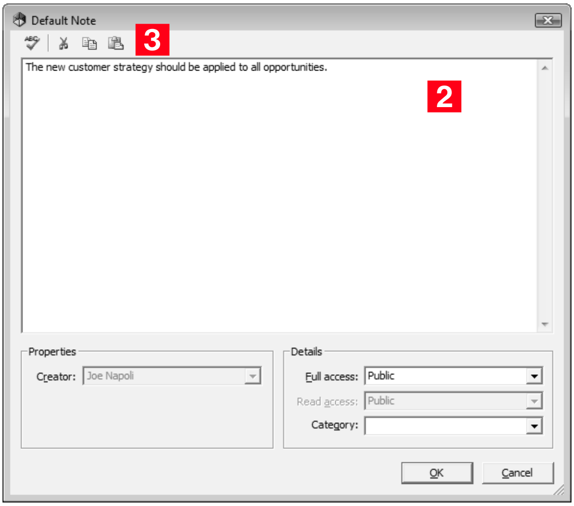
2 Enter the body text, and if necessary select a user or group for the Full Access and/or Read Access fields. You can also select a note category (these are set up on the System Fields tab in the Administrator preferences).

This information appears as part of the note each time a note for an Address Book entry, an opportunity, a campaign, a customer service case, or a journal entry is created. Note that the default note can be different for each type of entry.

3 Use the **Menu Bar** at the top of the note for various tasks.

See the mouse-over text or F1 Help for a description of each button. For example, you can check the spelling in your note using the Maximizer Spell Checker. Click the **Spelling** button to initiate the process.

4 Click **OK** to save the default note for each window.



Recording Additional Information with User-Defined Fields

Although the information you can record for Address Book entries covers the basics, you probably will want to record additional information, such as budget, income, interests, number of employees, or any other data. You can record this information in Maximizer with user-defined fields, which are custom fields for storing information in any of the following categories:

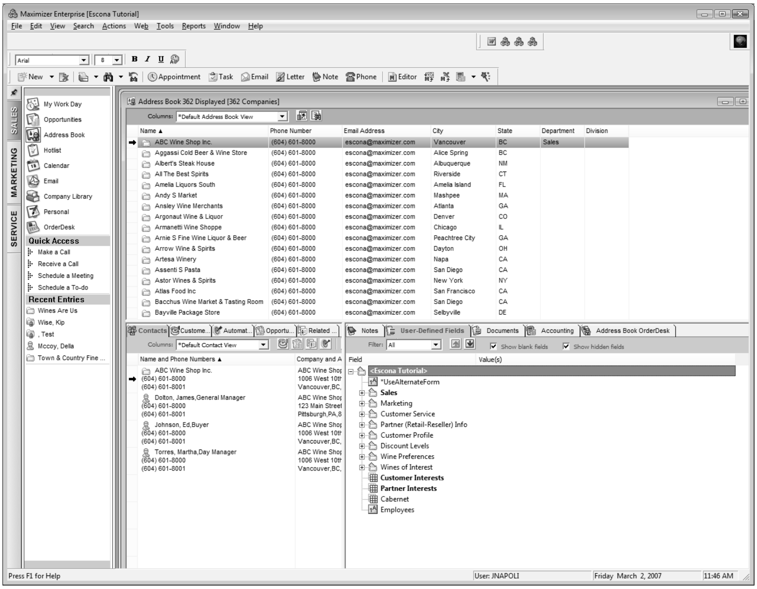
A user-defined field may belong to only one of these categories.

- **Address Book entries** – Available in the Address Book window. Also, up to 10 Address Book user-defined fields can be selected to be available in customer service cases (File > Preferences > Customer Service tab).
- **Opportunities** – Available in the Opportunities window.
- **Campaigns** – Available in the Campaigns window.
- **Customer Service Cases** – Available in the Customer Service window.
- **User accounts** – Available in the User Properties dialog box.

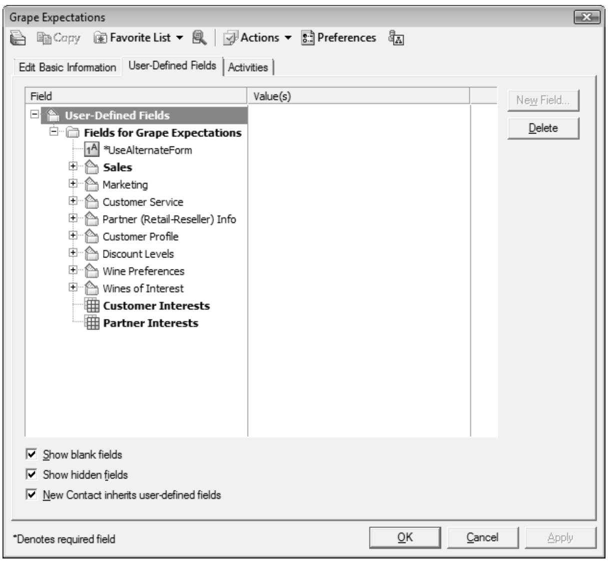
Work with User-Defined Fields

User-defined fields for Address Book entries, opportunities, campaigns, and customer service cases are available in the User-Defined Fields following window. Which category of user-defined field is visible in the following window depends on which of the main windows is active. For example, when viewing the Address Book window, the User-Defined Fields following window contains

only user-defined fields that pertain to Address Book entries, as shown in the following graphic.



You can also access user-defined fields for Address Book entries, opportunities, campaigns, and customer service cases from the User-Defined Fields tab of the dialog box for each Address Book entry, opportunity, campaign, or case. The folders and field names appear in a list on the left, and the field values on the right. The following graphic shows the User-Defined Fields tab of an Address Book entry.



User-defined fields that pertain to user accounts are available from **File** > **Users** > **Properties** > **User-Defined Fields**.

Keep the following points in mind when working with user-defined fields:

- By default, user-defined fields are displayed in tree view, where fields are nested within folders. You can also display the fields in an alphabetical list, without their folder structure. You can set your default user-defined field view by selecting **File** > **Preferences**, and setting the **View User-defined fields in tree view** option on the **System Defaults** tab.
- When you select the **Show blank fields** option on the User-Defined Fields tab, all user-defined fields in the Address Book are displayed, not only the fields with existing values. Double-clicking on a field in the window allows you to add or modify a user-defined field value.
- When you select the **Show hidden fields** option on the User-Defined Fields tab, fields and folders that are set to hidden appear shaded. When you deselect this option, the fields and folders are completely hidden.
- **Mandatory fields** are denoted with an asterisk displayed after the field name and type. This is not the same as having an asterisk included as part of the field name. System-defined fields are shown in bold, black text.
- The kind of **Address Book information** to which user-defined fields apply—Address Book entries, opportunities, campaigns, customer service cases, or users—controls the window in which the user-defined field is available. For example, if you create an opportunity user-defined field, it will be available in the User-Defined Fields following window only when the Opportunities window is the controlling window.
- If a **Contact** is associated with an entry, the **Company** and Contact user-defined fields are shown in separate folders.
- Your selection of user-defined fields is usually set up by your system administrator using Administrator. However, any user can be given the rights to create, change, or delete user-defined fields in Maximizer. If you have not been given the ability to set up user-defined fields, you can only assign values to existing fields.

Types of User-Defined Fields

There are four different types of user-defined fields. Each type has different properties and uses.

- **Table user-defined fields** enable you to select a value or values from a list. This type of field is very useful for multiple

choice or multiple value fields. If you create a table user-defined field with the “single value only” attribute, no more than one value can be selected from the list, which is particularly useful for fields where it wouldn't make sense to select more than one value.

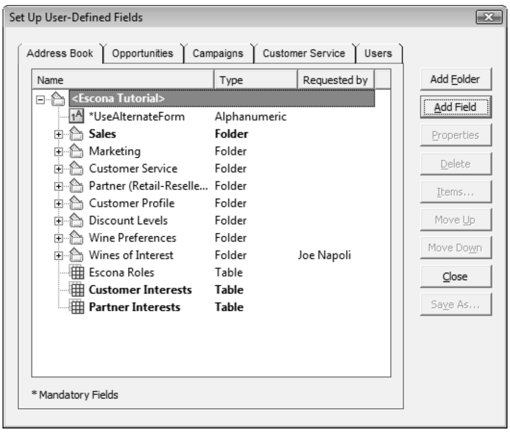
- **Date user-defined fields** can store a specific date or an annually recurring date.

Encrypted user-defined fields cannot be transferred, imported, or exported. They are also not searchable.

- **Alphanumeric user-defined fields** record any alphanumeric text (letters and numbers) up to a maximum number of characters that you specify. You can encrypt alphanumeric fields for security protection. Note that you cannot disable or enable encryption once you have created the field.
- **Numeric user-defined fields** record any numeric value you wish to keep for the Address Book entries. If you specify a number of decimal places for the user-defined field, you can use this field type for monetary amounts.

Set Up User-Defined Fields

User-defined fields are created and modified through the Set Up User-Defined Fields dialog box, which is available from the File menu.



The dialog box contains five tabs, one for each category of user-defined field. The user-defined field structure can also be multi-tiered with multiple levels of user-defined field folders, each of which may contain other folders or user-defined fields. The folder structure may contain a maximum of three folder levels.

Mandatory, System, and Key User-Defined Fields

Some user-defined fields are displayed in bold or with an asterisk:

- **Mandatory** user-defined fields are denoted with an asterisk displayed after the field type. (This is not the same as having an asterisk included as part of the field name.)
- **System** user-defined fields are shown in bold, black text.
- **Key** user-defined fields are specified on the Key User-Defined Fields preferences tab in Administrator. (File > Preferences > Key User-Defined Fields)

Sort order

There are two methods of changing the order of user-defined fields and folders:

- **Drag and drop** – You can use the mouse to drag and drop a field or a folder to a different position in the list. Dragging it onto a field places it immediately below that field. Dragging it onto a folder places it at the top of the list inside that folder. Holding the mouse on a folder for about a second expands the folder, and then you can continue dragging the item to a specific position in that folder.
- **Move Up and Move Down buttons** – Click the Move Up and Move Down buttons to move a field or folder up or down in the list. These buttons only move items within their current folder level. You cannot use them to move items in or out of folders.

Create New User-Defined Fields

Use the Set Up User-Defined Fields dialog box to create new user-defined fields and folders for use with Address Book entries, opportunities, campaigns, customer service cases, and user accounts. The Set Up User-Defined Fields dialog box is available from the File menu in both Administrator and Maximizer, although users can create user-defined fields in Maximizer only if the security settings in their user account allow them to.

Create New Folders for User-Defined Fields

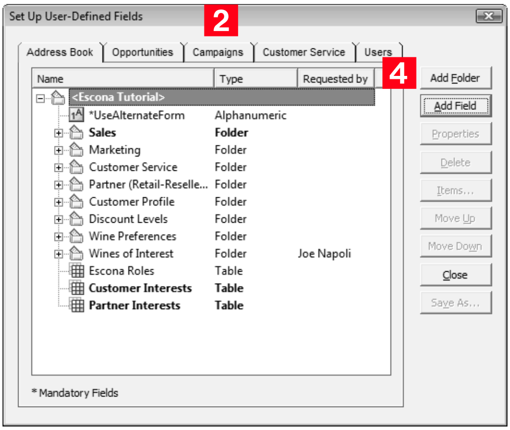
You can group similar user-defined fields into folders and subfolders to a maximum folder depth of three levels. Grouping user-defined fields into folders is particularly useful if you have a large number of user-defined fields. Grouping them makes them easier to find and reduces the amount of scrolling needed to find the one you are looking for.

➤ To create a new folder

1. Open the Set Up User-Defined Fields dialog box (**File** > **Set Up User-Defined Fields**).
2. Select the tab for the category of user-defined field.
3. To create a top-level folder, select the Address Book name at the top of the list.

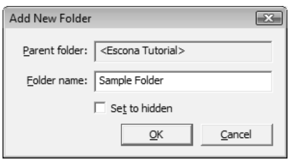
   – or –

   To create a folder within an existing folder, select the existing folder.
4. Click **Add Folder**.



ⓘ User-defined field and folder names cannot contain forward slash or backward slash characters (/ \ ).

5. Enter a name for the new folder, and click **OK**.



ⓘ If you set the folder to hidden, it is not displayed on the User-Defined Fields tab when you deselect the Show hidden fields option.

The new folder now appears in the Set Up User-Defined Fields dialog box.

6. Move the new folder to a different position in the list, if desired.

Create New User-Defined Fields

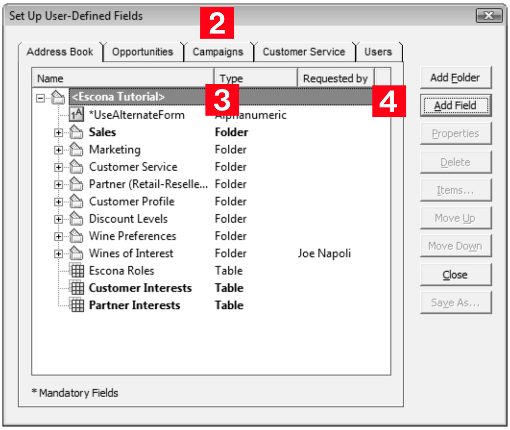
You can create user-defined fields in both Maximizer and Administrator, provided that your user account has sufficient privileges.

➤ To create a new user-defined field

1. Open the Set Up User-Defined Fields dialog box (**File** > **Set Up User-Defined Fields**).
2. Select the tab for the category of user-defined field to create.
3. Select an existing folder, inside which you want to create a new field.

   – or –

   Select a user-defined field. The new field will be created at the same level as the selected user-defined field.
4. Click **Add Field**.



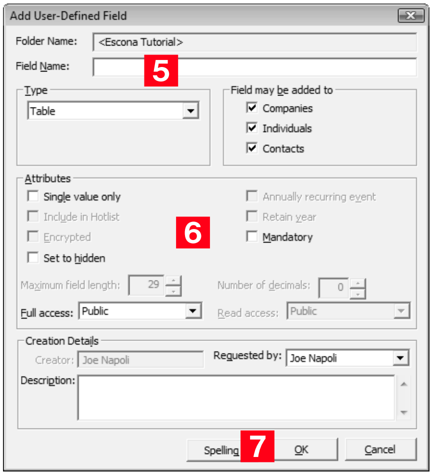
5. In the **Field Name** field, type a name for the user-defined field.
6. Specify the properties of the user-defined field.

   For detailed information about each of the property fields, click inside the dialog box and press **F1**.

ⓘ User-defined field and folder names cannot contain forward slash or backward slash characters (/ \ ).

7 Click **OK**.

You have now created a user-defined field.



8 Move the new field to a different position in the list, if desired.

Add Items to Table User-Defined Fields

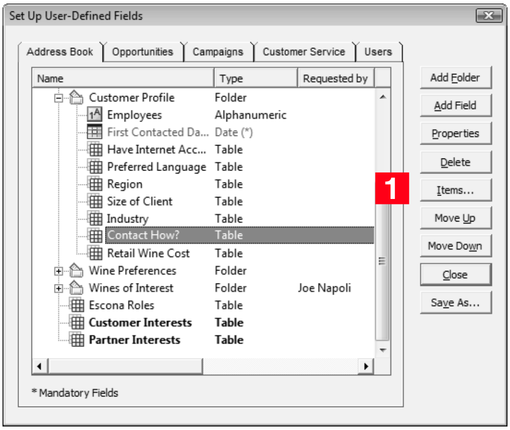
Table user-defined fields contain a list of similar items from which a user may select one or more items. As part of the process of creating a new user-defined field of this type, you should add the items to the table. However, while using the user-defined field in Maximizer, users may find a need to add an item to the list. A user can add items to a table user-defined field on-the-fly if the user account has sufficient privileges. Both procedures are explained in this section.

➤ To add items to a table user-defined field

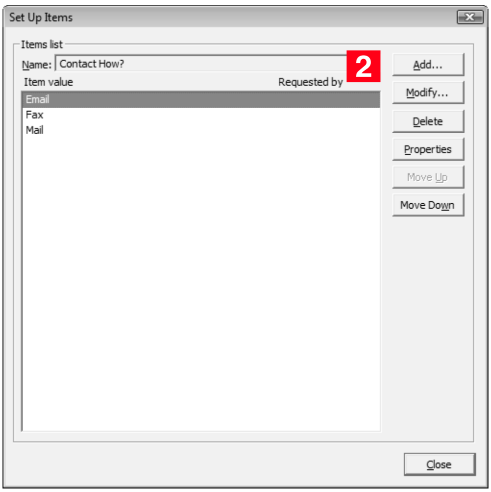
1. In the Set Up User-Defined Fields dialog box, select the table-type user-defined field, and click **Items**.

   – or –

   Double-click the table user-defined field.



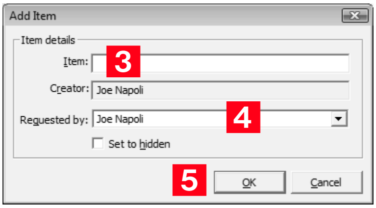
2. In the Set Up Items dialog box, click **Add**.



3. Type a name for the item.

If you set the item to hidden, you can hide it from the Available Values list by deselecting the Show hidden items option.

4 In the **Requested by** field, select the name of the user who requested the item creation.

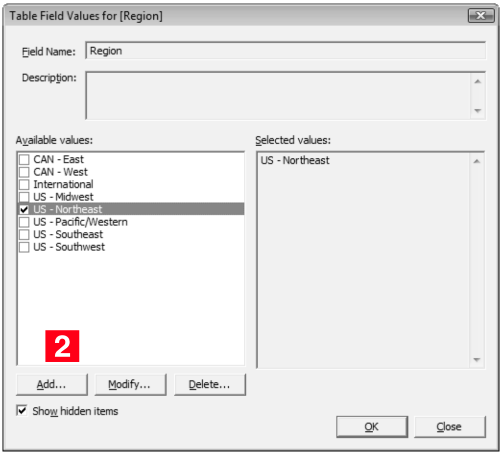


5 Click **OK**.

6 Repeat these steps to add any additional items to the table user-defined field.

➤ To add an item to an existing table user-defined field

1 In the User-Defined Fields following window, double-click the table user-defined field.



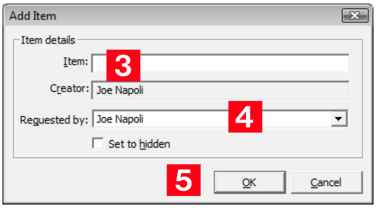
If you set the item to hidden, you can hide it from the Available values list by deselecting the Show hidden items option. You must also ensure that the item is not selected in the list. If it is, the item will still be displayed.

2 Click **Add**.

3 Type a name for the item.

4 In the **Requested by** field, select the name of the user who requested the item creation.

5 Click **OK**.



Modify Existing Table Items

You can make changes to a table item by using the following procedure.

➤ To change the properties of an item

1 In the User-Defined Fields following window, double-click the table user-defined field that contains the item you want to modify. The Table Values dialog box opens.

2 Select the item you want to modify and click **Modify**.

3 Make your changes in the Modify Item dialog box and click **OK**.

Modify Existing User-Defined Fields

➤ To change the properties of a user-defined field

1 Select the user-defined field in the Set Up User-Defined Fields dialog box.

2 Click **Properties**.

3 Change the properties as required.

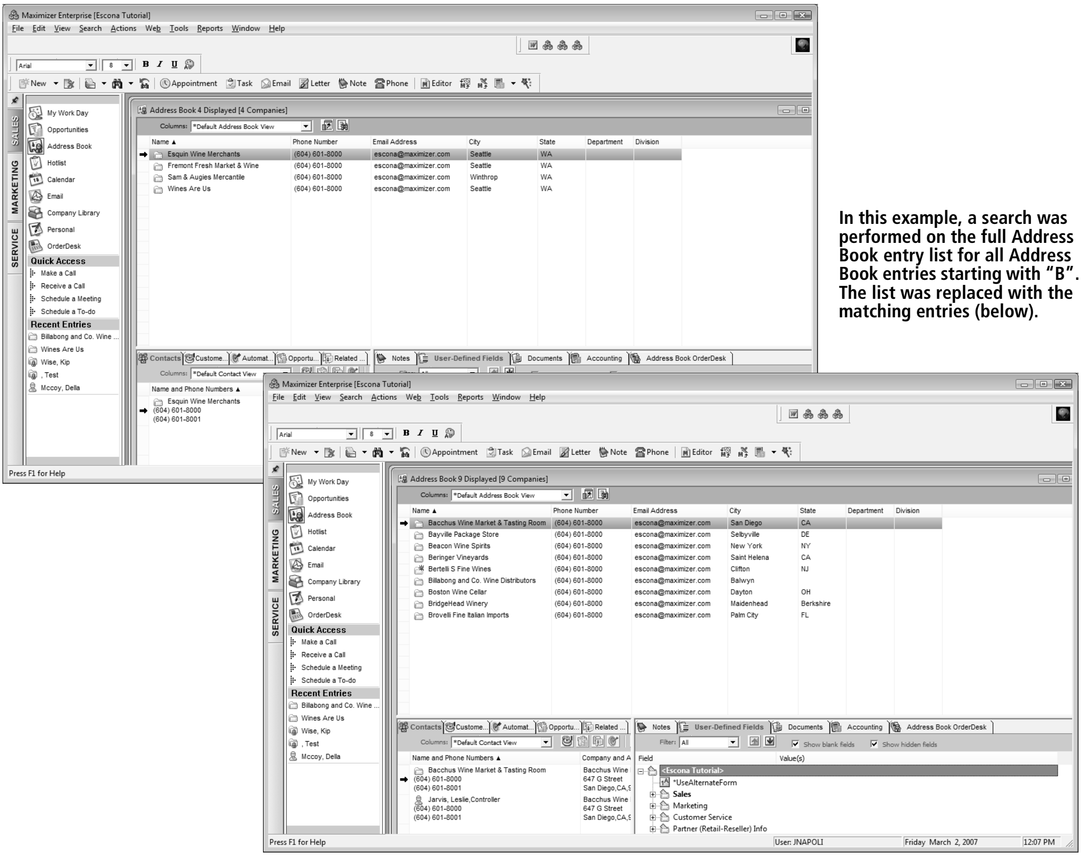
4 Click **OK**.

Creating Lists of Entries with Searches

Many of the actions you can perform with Address Book entries, customer service cases, campaigns, and opportunities apply to the entire list of entries in the active window. For instance, when you print a report from the Address Book window, you are generally given a choice between printing the selected entry (or entries) or printing the entire list. When you perform a mail merge, for instance, you generally use the entire current list.

A search retrieves any entries that match the search criteria and that you have the rights to view.

Maximizer's search features let you search any field for the data you specify and modify your current list with the matching entries. If you wanted to create a list of Address Book entries in Washington State, for example, you would search the State/Province field for entries with "WA" in that field.



In this example, a search was performed on the full Address Book entry list for all Address Book entries starting with "B". The list was replaced with the matching entries (below).

For assistance with searching for customer service cases and knowledge base articles see chapter 7 "Providing Customer Service" on page 219.

Search for Entries by Fields

Maximizer makes it easy to search by some of the basic fields, such as Last Name, Company, City/Town, or Email for Address Book entries or by Status, Team Leader, or Revenue for opportunities. The Search menu varies depending on what window is selected.

➤ To search entries by a field

1. From one of the main windows such as the Address Book window, Campaigns window, or Opportunities window, select the field you are searching for from the **Search** menu. Select **Other** to see additional fields by which to search your Address Book entries.

2. In the Search By [field] dialog box, specify the search criteria.

   Encrypted user-defined fields are not searchable.

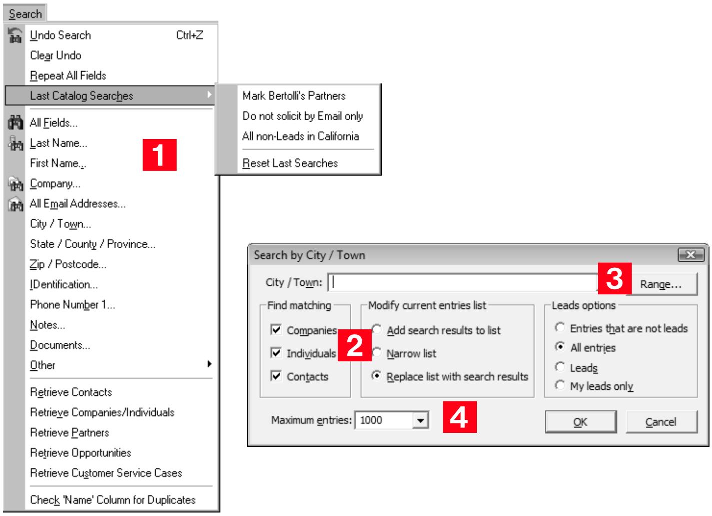
   You can select one of three options for updating the current list with your search results:

   - **Add search results to list** searches the entire Address Book and adds the matching entries to your list.
   - **Narrow list** searches your current list and reduces it to the matching entries.
   - **Replace list with search results** searches your Address Book and replaces your current list with the matching entries.

3. If applicable, specify the **Range** of the items to search.

If you change the maximum entries field to a value less than the system default value, the value will remain as your default value for subsequent searches. If you change this field to a value more than the system default value, it will return to the system default value for subsequent searches. The default values for the number of entries returned in a search is set in Administrator.

4 Specify the **Maximum entries** to be returned in your search. This number is important to note because it affects what is displayed in your list after your search.



Perform Advanced Searches by All Fields

In the Address Book window, you can click Repeat All Fields to repeat the last search. Once a search is saved in the catalog, you can access the most recent catalog searches right from the search menu.

Maximizer's Search by All Fields feature is useful when you need to search by fields that are not listed in the Search menu or when you want to search by more than one field. In the Search by All Fields dialog box, you can build complex search arguments and even save your search in the catalog for later use.

Use the Search by All Fields feature to find user-defined fields or a combination of user-defined fields and other fields to produce a custom list of Address Book entries, opportunities, campaigns, and customer service cases.

➤ To search by all fields

1 In the Address Book window, select **Search** > **All Fields**.

2 In the Search by All Fields dialog box, click **Add**.

3 In the Select Fields for Search dialog box, select one or more fields and click **OK**.

Select the Search for no value checkbox to search for entries where no value is assigned to the selected field.

To retrieve all Address Book entries that do not have email addresses, do a search by all fields, choose the email field, leave the search range blank, and then click the Not Equal button.

Use Last Search and Catalog for previously defined searches.

4 For each field you selected in the previous step, select or specify values in the dialog box that is provided.

If applicable, indicate under **Search conditions** whether to return entries that match all values, or that match one or more values.

5 Specify the remaining search criteria in the Search by All Fields dialog box.

To build a list of entries that excludes a certain group, as in a list of all Address Book entries except those in a certain state or province, use the **Not Equal** button.

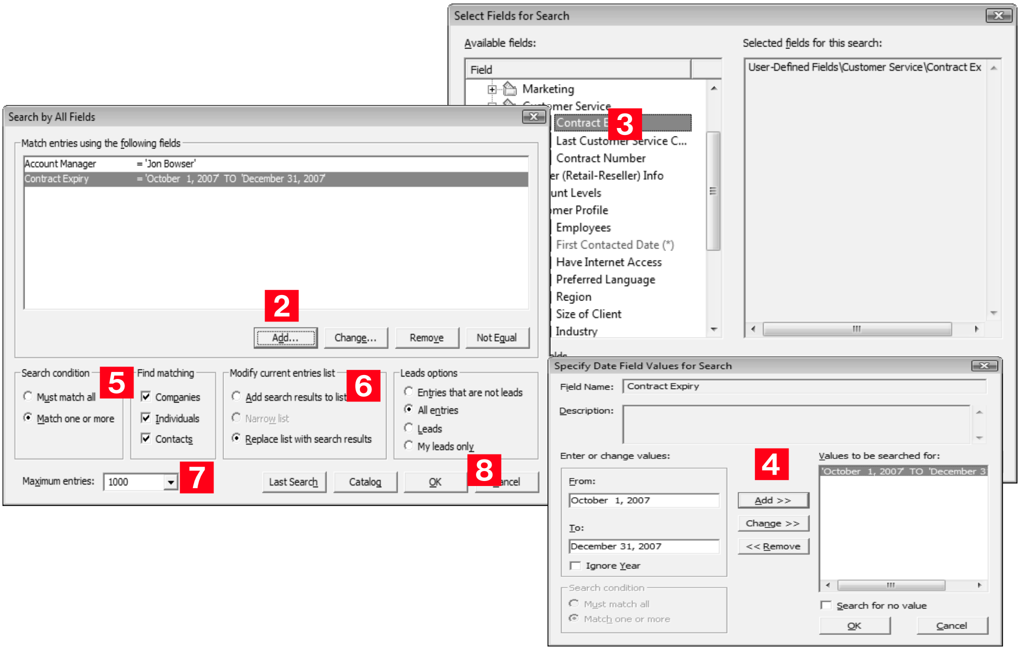
6 In the **Modify current entries list** group box, select one of the options.

- **Add search results to list** displays the entries that match your search criteria, without removing any currently displayed entries from the list.
- **Narrow list** searches only selected entries (or all currently displayed entries if none are selected), and removes any entries that do not match your search criteria.
- **Replace list with search results** removes all entries currently displayed in the list and replaces them with entries that match your search criteria.

You can choose to further narrow the search by specifying options to include or omit sales leads.

7 Select or type the **Maximum entries** you would like to be returned.

8 Click **OK** to start the search.



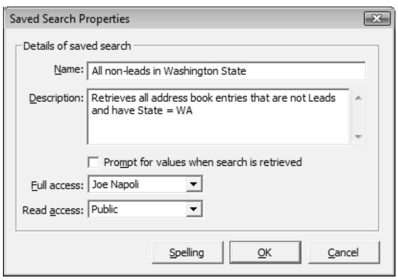
➤ To save your search to the search catalog

1 Enter your search criteria in the Search by All Fields dialog box.

2 Click **Catalog** and click **Add**.

3 Specify the saved search properties and click **OK**.

ⓘ See F1 Help for detailed information on saved search properties.



The search is added to the search catalog. To retrieve a saved search, click **Catalog**, select the search, and then click **Retrieve**.

Use the Undo Search and Last Catalog Searches Menu Items

You can quickly undo a search or perform a recent search in the Address Book, Opportunities, or Customer Service windows.

➤ To undo a search

- After performing a search, select **Search > Undo Search**. This replaces the current list with the entries from the previous list.

➤ To retrieve a previous catalog search

- Select **Search > Last Catalog Searches** and select a previous search. This retrieves the list of entries associated with the previous catalog search.

Create Favorite Lists from Searches

After you have performed a search, you can create a Favorite List so it can be easily accessed. Favorite Lists are available in the Address Book window as well as the Customer Service window.

➤ To create a Favorite List of entries

1. Search for the entries you want saved in the Favorite List.
2. Select **View > Favorite Lists** and then click **Add**.
3. In the Favorite List Properties dialog box, enter a **Name** and **Description** for the list.
4. Select an option from the **Full Access** drop-down list.

   If you leave **Public** selected, all users can modify or delete the Favorite List. If you select a group or user, only members of that group or that particular user can perform these actions.
5. Select an option from the **Read Access** drop-down list.

   If you leave **Public** selected, all users can see and retrieve the Favorite List. If you select a group or user, only members of that group or that particular user can see and retrieve the Favorite List.
6. If you are creating a Favorite List for Address Book entries and want this Favorite List to appear each time you open Maximizer,

select the **Retrieve this list when an Address Book is opened** option in the Favorite List dialog box.

Once this option is selected, the setting overrides the **Ask at Address Book startup which list to view** option on the **System Defaults** tab.

➤ To retrieve saved Favorite Lists

- To retrieve the list, select **View > Favorite Lists** and select the list you want to view. You can also use the **View > Recent Favorite Lists** to retrieve Favorite Lists you have recently accessed.

➤ To add entries or remove entries in a Favorite List

1. In the **Address Book** or **Customer Service** window, select the entries to appear in your updated list.
2. Select **Add to Favorite List** or **Remove From Favorite List** from the **View** menu.
3. In the Favorite Lists dialog box, select the **Favorite List** you are updating.
4. Select **Selected entries**, **Current entries**, or **All entries**.
5. Click **OK** to confirm that you want to update the list.

   Maximizer replaces the selected Favorite List with the entries in the current list.

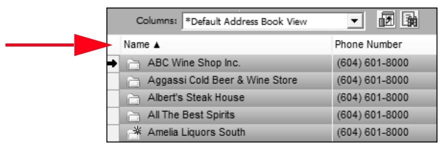
Select and Display Entries in a List

After you have performed a search, you will most likely want to perform some action on the entries or a subset of the entries. There are a couple of ways to quickly select and display entries in a list.

➤ To select all entries in a list

- Click the gray button on the top left of the corner of a main window such as the Address Book window, as shown below.

Click this box to select all entries in the current list.



➤ To display only selected entries

- If you have selected several entries in your current list, select **Edit** > **Make Selected List Current** to remove the deselected entries from the current list and only display the selected entries.

Tracking Your Appointments and Hotlist Tasks

To learn more about the Hotlist window, press F1. For assistance adding a Hotlist task, select the Wizards button on the Standard toolbar and run the Add Hotlist Task wizard.

The Hotlist is a timeless "to-do" list of tasks and reminders. Tasks include calling and writing to customers. Use the Hotlist window to record actions and follow-up on personal activities, such as producing expense reports, or those related to your interactions with Address Book entries. For example, you can use the Hotlist to schedule a phone call to a Contact who is out of town for a week. When the week is up, the Hotlist will remind you to call again.

Hotlist Window

Tasks can be reassigned to another user. When a Hotlist task is added or reassigned, a note is created in the Notes window. This note includes the name of the person to which the Hotlist task is assigned.

Because the Hotlist is a controlling window, all your following windows update with it providing you with instant access to all information about the person or organization with which you are dealing. You can quickly handle all your communications—from phone calls to email—and record the results directly from the Hotlist.

The Hotlist window is also associated with the Customer Service window. A Hotlist task, based on a case's follow-up deadline, is automatically created for the assigned user when a case is created (assuming a user and follow-up deadline are assigned). The task is automatically modified when the follow-up deadline or assigned user is modified. And when the case is resolved, the task is marked as complete. To learn more about customer service cases, see chapter 7 "Providing Customer Service" on page 219.

Your Hotlist can also show tasks for opportunities if you are a member of a sales team. Team leaders assign these tasks to you.

➤ To use the Hotlist window

1. Click the **Hotlist** icon or select **Hotlist** from the **Window** menu.
2. Select the **Show Appointments** option to have your appointments appear in your list with your tasks.
3. Use the view **Filter** to select the date range you want to show.
4. To add a new task, select **Edit > Add Task**.

   – or –

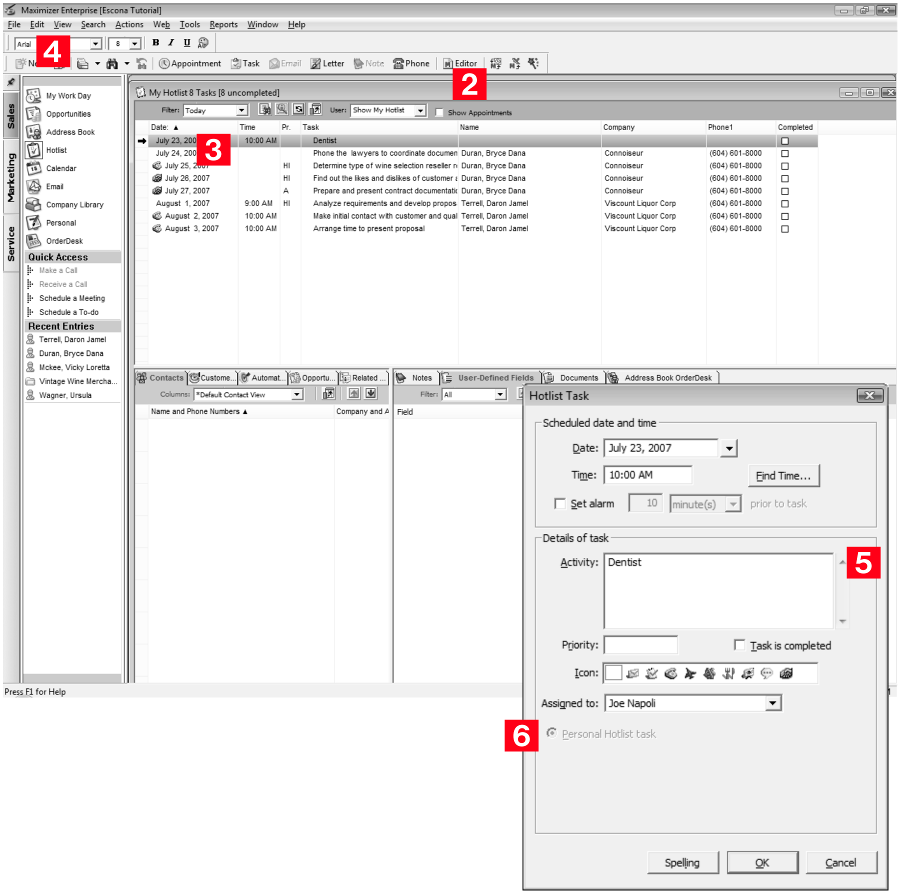
   If a task is associated with an Address Book entry, select the entry in the Address Book window and drag it to the Hotlist icon.

   You can view or modify an existing task by double-clicking the task.

To create or modify column setups for the Hotlist window, click the Column Setup button on the View bar. For more information, refer to "Use Column Setups to Organize Lists" on page 51.

5. Select a predefined **Activity** from the drop-down list (click inside the text box to access) or enter an activity.

6 A task can be personal or associated with an Address Book entry. To mark a task as personal, select the corresponding option. Otherwise, the task is created for the current Address Book entry.



Control Calendar and Hotlist Task Preferences

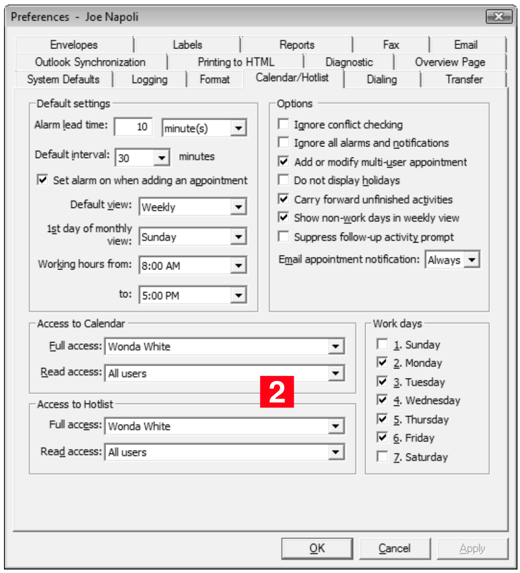
Use the Calendar/Hotlist preferences tab to change your Hotlist task and calendar preferences. Most of the options on this tab apply to the calendar.

Hotlist and calendar preferences can also be controlled in Administrator using the user preferences Calendar/Hotlist tab.

➤ To set calendar and task preferences

1 Select **File > Preferences** and click the **Calendar/Hotlist** tab.

2 Set your calendar and hotlist default options. For detailed information on each option, press **F1**.



You can control which users can view or modify your tasks and appointments using the **Full Access** and **Read Access** options. For example, if you want a user or group to be able to view your tasks and appointments, select the name from the Read Access drop-down list. The selected user or members of the group can then view your tasks and appointments by selecting your user name from their Hotlist window View bar. If you want them to be able to add or modify your existing tasks and appointments, use the Full Access option.

Appointments can be reassigned through the Hotlist window.

The Full Access option also controls your ability to reassign tasks and appointments to other users, as you can only assign tasks and appointments to other users if they have given you permission.

Calendar Window

The Calendar window is where you schedule meetings and appointments. You can view, add, update, and delete appointments.

The daily view shows your day in half-hour intervals—use the Calendar/Hotlist preferences tab to change this interval length.

The following views are available in the Calendar window: Daily, Weekly, Weekly List, and Monthly. All views allow you to see your appointments at a glance.

To assist you with scheduling, color bars/icons indicate the attendees and booked resources and locations for the appointment. You can display the appointments for other users if they have given you access to their calendars. Calendar access is set on the Calendar/ Hotlist tab in preferences.

Your system administrator uses the Utilities > Holiday Editor in Administrator to set up the holidays that are displayed in the Calendar window. These holidays can be changed. For further information, see the *Maximizer CRM Administrator's Guide*.

➤ To view appointments in the Calendar window

1. In the Calendar window, click the associated button to choose your calendar view—**Daily**, **Weekly**, **Weekly List**, **Monthly**, or **Today**.
2. In the monthly view, holding your mouse pointer over a day displays all the appointment details for that day in a pop-up window. You can then hold your mouse over a particular appointment to view the appointment details. Or, you can click on the appointment in the pop-up window to open it.

   If the appointment is assigned to multiple Address Book entries, all the entries are displayed in the pop-up window.

   In the weekly, weekly list, and daily views, holding your mouse over an appointment displays the appointment details. Double-clicking on an appointment opens it.

   A scroll bar appears when all the appointments do not fit in the day cell.

   In the weekly list view, all the appointments for a day are listed in an easy-to-view format. Appointment details such as start/end time and location are displayed.
3. Open another user's calendar by selecting the user's name from the **Users** drop-down list. Both the selected user's appointments and your own appointments are displayed. You can also view the booked time for meeting locations and resources by choosing the corresponding value in the list.
4. To quickly navigate from one day to the next in the daily calendar view, use the arrow buttons located in the upper-left section of the window. You can also navigate from week to week and month to month using these buttons when in the weekly/weekly list or monthly calendar views.

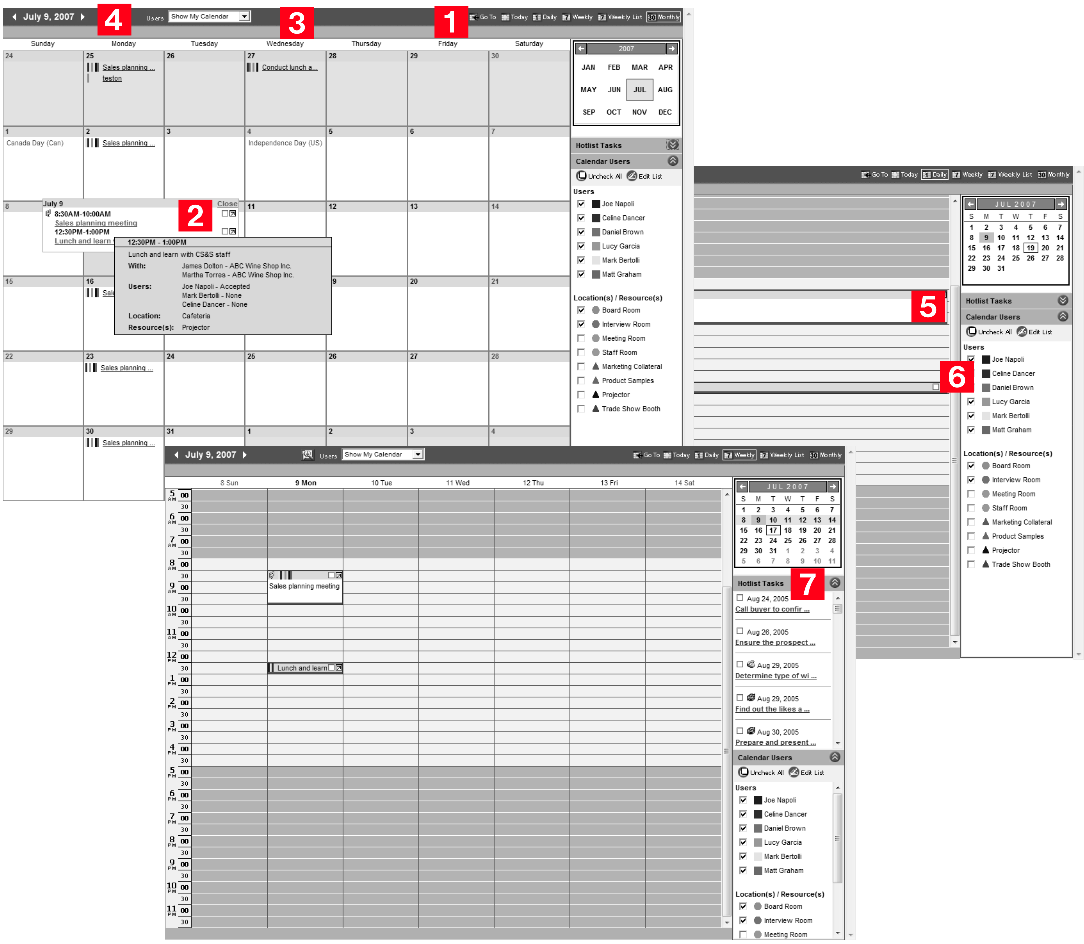
Use the arrow buttons in the upper-right section of the window to move from one year (monthly view) or month (daily and weekly/weekly list view) to the next. Click on a month or day to show it in the main portion of the Calendar window.

5 The day's Hotlist tasks are listed in the Hotlist Tasks section. Click a Hotlist task to view the details of the task.

If a scheduling conflict with a user or a resource/location occurs, Maximizer prompts you with a message.

6 You can view another user's appointment by adding the user to the **Calendar Users** list and selecting the checkbox beside the user's name. Use the **Check All** and **Uncheck All** options to quickly select or deselect all users in your Calendar Users list. Use the **Edit List** option to add users and resources to the calendar, and to set icon colors for these users and resources.

7 Use these buttons to hide the associated section of the Calendar window.



Add New Appointments to Your Calendar

You can easily schedule an appointment with Address Book entries, other users, or yourself. The Add Appointment dialog box gathers all the information for the appointment—the date and time, the description, and even who will be in attendance.

When scheduling appointments, you can set an alarm in advance of the appointment, mark yourself out of the Peg Board, set the priority, and even send an email message to the selected users, the associated Address Book entries, and yourself.

You can schedule appointments from any controlling window, or from the Calendar window. If you add an appointment from a controlling window, the appointment is linked by default to the current entry. If you add an appointment from the Calendar window, it is by default created as a personal appointment.

If the appointment is assigned to multiple Address Book entries, the text "(with multiple Address Book entries)" is displayed in the Name column of the Hotlist task.

Appointments can be viewed in the Hotlist window provided you select the Show Appointments option on the Hotlist's View bar. (If you are using the Outlook Style window layout, you may need to drag the following windows a little to the right.) Calendar appointments can be reassigned to other users through the Hotlist window.

Other users can view your appointments, or even schedule them, if you have given them access using your Preferences > Calendar/Hotlist tab. When an appointment is marked as private, even those with access to your calendar cannot see the appointment details.

➤ To schedule an appointment

1. In a controlling window, select an entry if you would like to schedule the appointment with a specific Address Book entry and do one of the following:

   - Right-click and select **Schedule > Meeting**.
   - Click the **Appointment** button on the toolbar.
   - Drag the entry from the controlling window to the **Calendar** window or the **Calendar** Icon.

   – or –

   In the Calendar window, select a date and do one of the following:

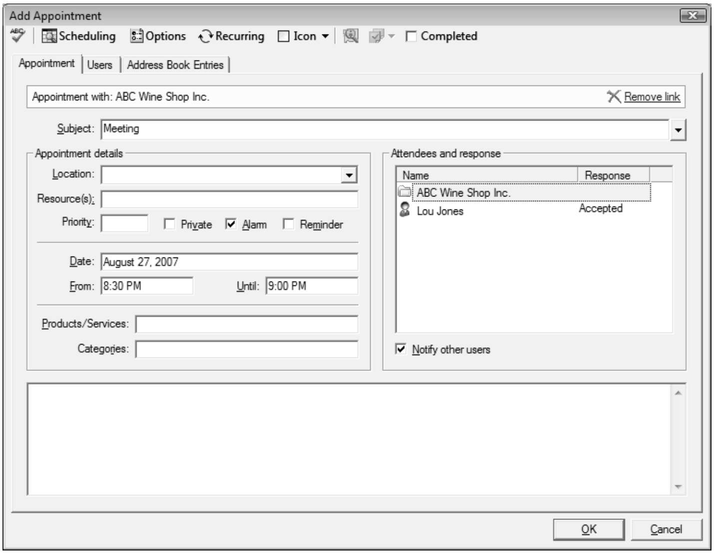
   - Right-click and select **Add Appointment**.
   - Click the **Appointment** button on the toolbar.
   - From the **Edit** menu, select **Add Appointment**.

2. In the Add Appointment dialog box, fill in the details of the appointment. For more information, see "Using the Add/Modify Appointment Dialog Box" on this page.
3. Click **OK**.

You can also create appointments from email. See "Create Appointments and Tasks from Email" on page 140 for details.

Using the Add/Modify Appointment Dialog Box

This dialog box contains a toolbar and three tabs: Appointment, Users, and Address Book Entries.



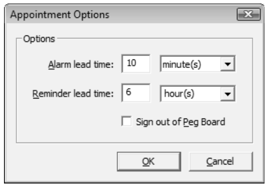
Using the Toolbar

The toolbar allows you to set appointment options and perform tasks such as checking spelling and finding free meeting times.

If a scheduling conflict with a user or a resource/location occurs, Maximizer prompts you with a message.

- Click the **Scheduling** button to open the Find Free time dialog box, where you can find free time slots for locations, resources, and users who have allowed you access to their calendars.
- To set lead times for alarms and email reminders, click the **Options** button. (To control the default setting for alarms, select File > Preferences > Calendar\Hotlist.)

- If you want the appointment to change your Peg Board status, click the **Options** button and select the **Sign Out of Peg Board** checkbox.



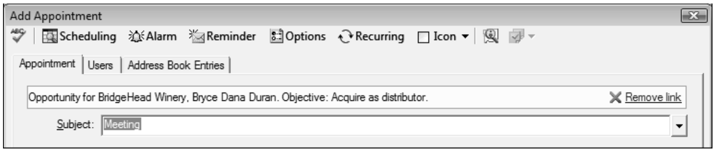
- To schedule a recurring appointment, click the **Recurring** button. See F1 Help for more information.
- Click the **View in Address Book** button to view selected Address Book entries in the Address Book window.
- Click the **Icon** button to select an icon to display with the message in the Calendar and Hotlist windows.
- In the Modify dialog box, the **Actions** menu is available if you select an Address Book entry in the attendee list. If you select a user, this menu is disabled.
- Select the **Completed** checkbox to mark the appointment as completed.

Using the Appointment Tab

Use this tab to fill in appointment details and view information about the appointment.

- When you add an appointment from a controlling window, it is by default linked to the current entry. Information about the entry is displayed in the information bar. If the current entry is an opportunity, case, or campaign, the entry is displayed as a link in the saved appointment. When you open the appointment, you can click the link to view the entry in the associated controlling window.
- When you add an appointment from the Calendar window, it is by default created as a personal appointment. You can, however, link the appointment to the current entry or assign entries to it in the Add/Modify Appointment dialog box.

- When creating an appointment, you can unlink the current entry from the appointment by clicking **Remove link**.



- If the appointment you are creating is linked to an opportunity or case, the assigned Contact is added to the **Assigned Attendees list** on the Address Book Entries tab. If you click **Remove link**, the Contact is removed from this list.
- When an appointment is not linked to an opportunity, case, or campaign, and no Address Book entries are assigned to it, the appointment is designated a personal appointment.
- Select a **location** for the appointment and specify the needed **resources**. These values are set in Administrator. Use the **Scheduling** button to look for free times.
- To set a **priority** for this appointment, set a value in the **Priority** drop-down list.
- To keep the appointment details private, select the **Private Appointment** checkbox. When this option is selected, even those with access to your calendar cannot see the appointment details. The appointment appears in the calendar with the activity displayed as "Private Activity".
- To set an alarm, select the **Alarm** checkbox.
- To send yourself and selected users an email reminder (an email message will not be sent to the associated Address Book entries), select the **Reminder** checkbox. This generic message lists the basic appointment details; you cannot edit this message. This feature is available if the Maximizer Email Service is running.

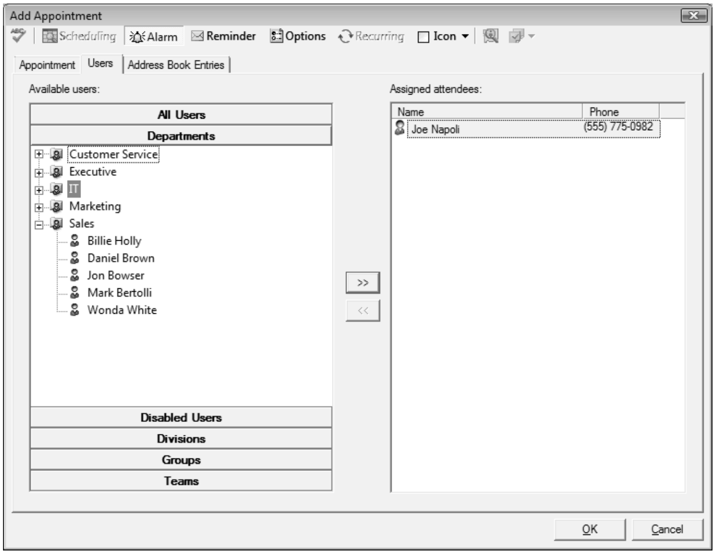
For more information on displaying products/services and categories, see Maximizer Help.

- You can display products/services and categories related to the appointment by selecting values from the **Products/Services** and **Categories** boxes.
- The **Attendees and response** list displays meeting invitees and their responses (blank if no response, Accepted, Tentative, or Declined).
- To notify invitees about the meeting and allow them to accept or decline, select the **Notify Other Users** checkbox.
- You can add a note to the appointment in the text box in the lower part of the dialog box.

Using the Users Tab

Use this tab to select users to attend the meeting.

- Available users are displayed on the Users tab by group (all users, departments, disabled users, divisions, security groups, or teams). If you don't want to display users by group, deselect the **Display Users by Groups** option. (Select **File > Preferences > System Defaults.**) If you don't want to display a specific group, deselect it on the System Defaults tab.
- To add a user to the **Assigned Attendees** list, select the user and click the right arrow button. To add all the users in a group to this list, select the group and click the right arrow button. To remove a user from the list, select the user and click the left arrow button..



Using the Address Book Entries Tab

Use this tab to search for Address Book entries and assign them to an appointment. Also use this tab to unassign the current Address Book entry from the appointment.

- Search for entries by **Last Name** or by **Company**. Select an entry in the search results list and click the right arrow to add the entry to the **Assigned Attendees** list.

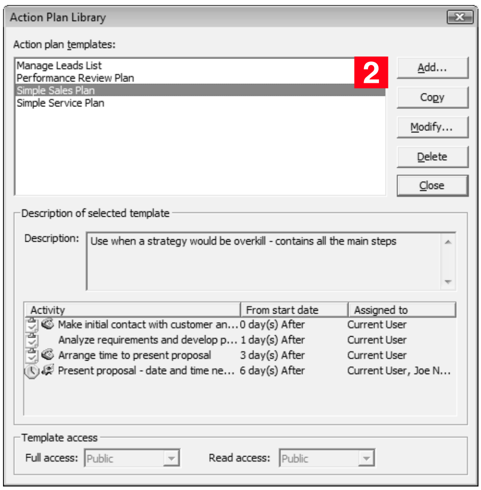
- To remove an Address Book entry from the **Assigned Attendees** list, select it and click the left arrow.
- If the appointment is linked to a case or opportunity, you cannot remove the assigned Contact from the **Assigned Attendees** list.

Use Action Plans to Create Appointments and Hotlist Tasks

You can create Action Plan templates, which can later be scheduled to create appointments and Hotlist tasks for Address Book entries. Action Plans can apply directly to the Address Book entry or to an opportunity or a customer service case for an Address Book entry. You can also schedule Action Plans to create personal appointments and Hotlist tasks.

➤ To create an Action Plan template

1. Select **File > Libraries > Action Plan Library**.
2. Click **Add**.



3. In the **Add Plan Template** dialog box, enter the **template name** and **description**.
4. Click **Add** and select **Appointment** or **Task** to add an activity in the template.
5. Enter the Appointment or Hotlist task details and click **OK**. You will now see the activity listed as part of the template.

   Repeat steps 4 and 5 for each activity you are adding to the template.

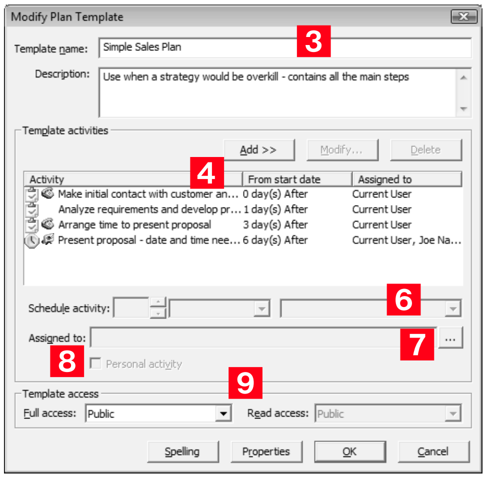
6 If you wish to modify the start date of an activity, change the information in the **Schedule activity** fields.

7 Click the ellipsis button beside the **Assigned to** field to assign an activity to another user. By default, the current user is the assigned user.

8 Select the **Personal activity** option to mark this task as not associated with an Address Book entry.

Click the Properties button to view creation details of the plan such as the Action Plan ID number and creation date. The Properties button is also accessible when you are modifying an Action Plan template.

9 Select a user or group name in the **Full Access** and **Read Access** fields to make this Action Plan template accessible to only a particular user or group.



➤ To schedule an Action Plan for an Address Book entry

Each time an Action Plan is scheduled for an Address Book entry, a note is logged in the Notes window.

1 To schedule an Action Plan associated with an Address Book entry, select an entry in the Address Book, Opportunities, or Customer Service window, right-click and select **Schedule > Action Plan** or **Schedule an Action Plan**. The Action Plan is scheduled for the associated Address Book entry.

2 Select an Action Plan from the **Plan template** drop-down list.

Optionally, you can modify the **Plan name** and **Description**.

The **Save As** button allows you to save a modified Action Plan as a different template.

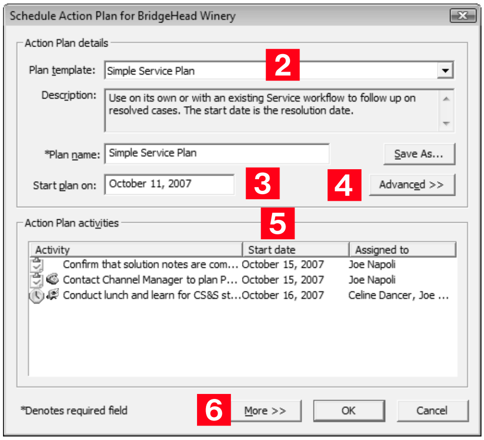
3 Enter a start date in the **Start plan on** field. You can click inside the field and then click the ellipsis button to choose a date from a pop-up calendar.

4 Click **Advanced** to toggle between the advanced and simplified view of the dialog box.

5 Enter the Action Plan details.

The **Replace current user with** option allows you to assign another user to all appointments and tasks included in the Action Plan. Similarly, you can assign a specific appointment or task to another user when the appointment or task is created or modified. The **Skip non-work days** option excludes days you have marked as non-work days in your Calendar preferences from the Action Plan.

6 Click **More** to add a new appointment or task to the Action Plan. You can also modify or delete a selected appointment or task in the Action Plan using the More button.



➤ To schedule a personal Action Plan

- To schedule a personal Action Plan, right-click and select **Schedule > Action Plan** or **Schedule an Action Plan** without an entry selected. The appointments and tasks associated with the Action Plan are automatically created as personal.

View Activities

When an Action Plan is scheduled in the Address Book window, it does not appear on the Activities tab in the Opportunity or Customer Service windows. If scheduled in the Opportunities or Customer Service windows, it does appear in the Address Book entry's Activities tab.

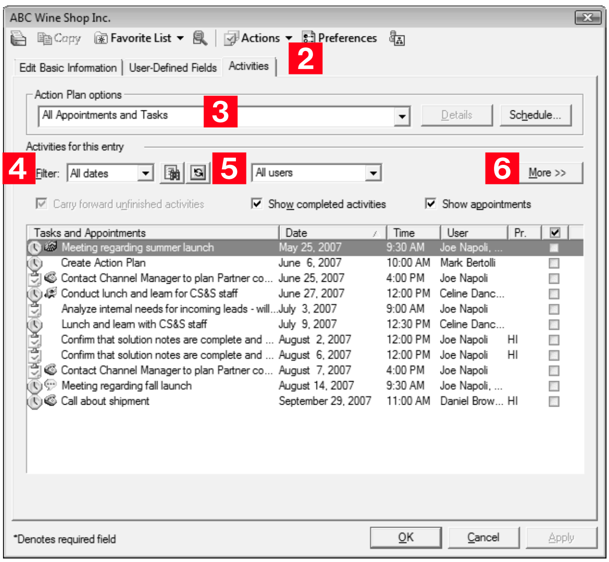
The Details button allows you to view the details for a selected Action Plan such as the description or properties. The Schedule button allows you to schedule a new Action Plan for the current Address Book entry.

You can view activities scheduled for Address Book entries from the Address Book window. You can also view activities specific to an Address Book's opportunities and customer service cases in the related window.

➤ To view activities for Address Book entries

1. Open the related Address Book entry.
2. Click the **Activities** tab.
3. By default, all activities are displayed in the Activities tab. You can choose to view only Action Plan activities or filter the list to view only those Action Plan activities related to a specific date range, module, and/or user.
4. Further filtering can be done for the activities list by using the **Filter** drop-down and **User** drop-down lists, the **Custom Filter** button, and also the **Show Appointments** option.
5. Click the **Refresh** button to update the list of activities when you add an activity to an Action Plan.
6. Click **More** to add, modify, or delete an activity in a selected Action Plan.

You can also view a list of all your activities by choosing **View > Activities [for Address Book entry]**. The activities shown in this dialog box are related specifically to Address Book entries, unless you have no Address Book entries in your current list, in which case the list displays personal activities.



➤ To view activities related to opportunities and cases

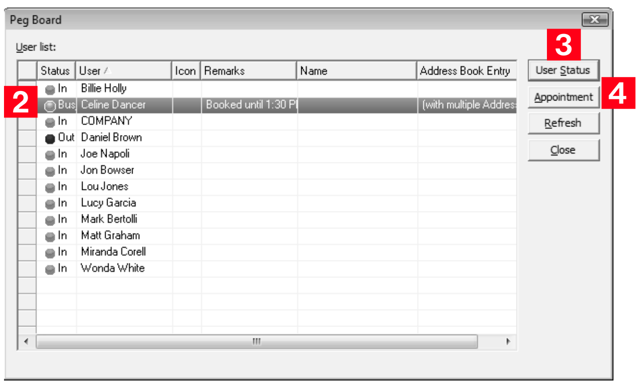
1. Open the related opportunity or customer service case in the respective window.
2. Click the **Activities** tab.
3. Follow the steps listed in the previous heading procedure to filter your activities list or make changes to an Action Plan.

Check Your Co-workers Status with the Peg Board

In a medium to large office, it’s not always obvious when people are in, out, or busy with an appointment. The Peg Board works with Maximizer’s calendar to show you each user’s current status.

➤ To view the Peg Board

1. Select **View > Peg Board**.
2. The status indicators denote if a user is busy or not. When a user creates an appointment, the **Sign out of Peg Board** option must be selected so the Peg Board is updated.
3. To override the calendar status, click on the **User Status** button to manually set a user’s status.
4. You can see other users’ busy periods if they have allowed you to view their calendars (File > Preferences > Calendar/Hotlist tab). If a user has allowed others to view their calendar, you can click the **Appointment** button to view the details of the user’s appointment.



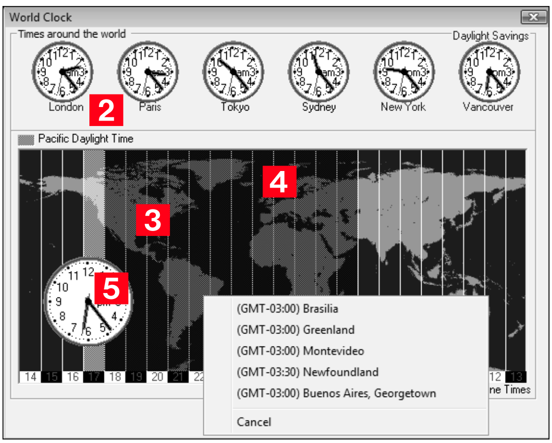
Check the Time in Other Cities Using the World Clock

The World Clock is a utility that allows you to view the time in various locations around the world. You determine which locations are displayed. It's great if you have international dealings of any kind—from the occasional phone call to regular contact with your international clients.

You can set the time for up to six remote locations around the world by adjusting the dials shown in the Clock frame in the World Clock window.

➤ To use the World Clock

1. Select **Tools > World Clock**.
2. To select a time zone, right-click on one of clocks.
3. To view time zone information, click in the corresponding area of the world map.
4. The shaded area indicates night time. Right-click to turn the **Show night** option on or off.
5. Click on any time zone in the world map to view the time in the large clock.



Using Organizational Charts

You can easily see the hierarchical structure of a Company or an Individual entry using organizational charts. Maximizer users can also be viewed within an organizational chart. Using drag and drop, you can change the structure of the chart as well.

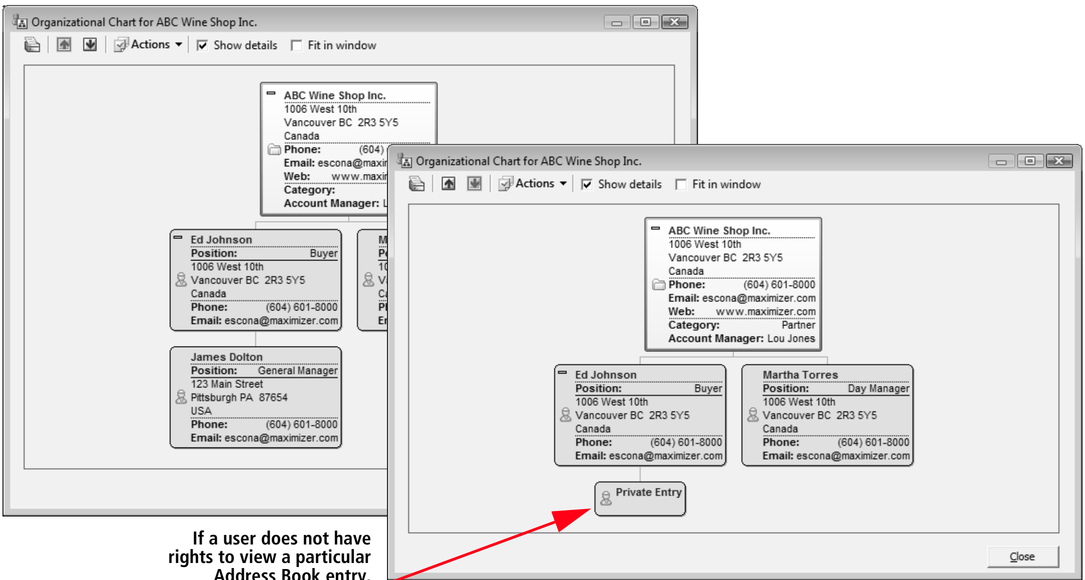
➤ To view an organizational chart for a Company or Individual

1. In the **Address Book** window, select the Address Book entry for which you would like to view the organizational chart.

2. From the **View** menu, select **Organizational Chart**.

   The organizational chart appears displaying the entry's associated Contacts in a hierarchical format.

   - To view the organizational chart for the previous or next entry in the Address Book list, use the **Previous entry** and **Next entry** buttons.
   - Use the **Print** button to print the organizational chart.
   - You can choose not to show the details such as a Contact's position by not selecting the **Show details** checkbox.
   - To fit the entire organizational chart into the dialog box, choose the **Fit to page** option.



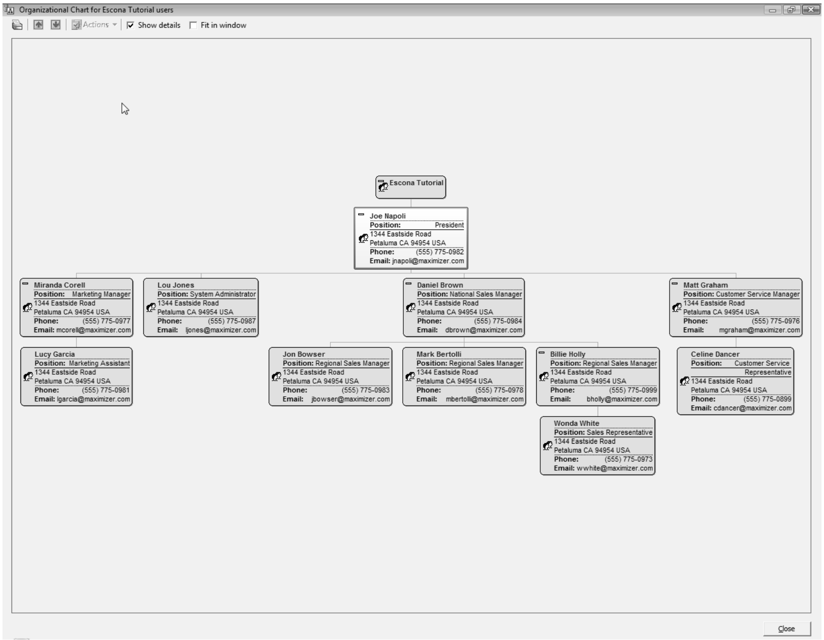
If a user does not have rights to view a particular Address Book entry, Private Entry displays in place of the entry details.

➤ To view an organizational chart for Maximizer Users

1. From any Maximizer window, select **Users** from the **File** menu.
2. Click **Org Chart**.

Disabled users are shown in organizational charts.

The organizational chart appears displaying all Maximizer users in a hierarchical format.



➤ To modify an organizational chart

There are two ways to modify the structure of an organizational chart as follows:

- Drag and drop a Contact on to the Contact you want the first Contact to report to. For example, if you would like Billie Holly to report to Joe Napoli, you would drag her entry on to Joe's entry (these are the Escona sample Address Book users). Click **OK** to confirm the reporting change.

  – or –

- Change the **Reports to** field on the Contact's Basic Information tab.

Sharing Your Files in the Company Library

You can search for files in the Company Library by using the search commands on the Search menu when the window is active. The Search Next command allows you to repeat a previous search. The Search button allows you to search for a filename.

You know the value of keeping an organized database of your marketing materials and other company collateral. Brochures, price lists, photos, magazine reviews—all of these materials should be easy to find when you need them. The Company Library provides shared access to a central library of these materials with the security offered by the Maximizer environment.

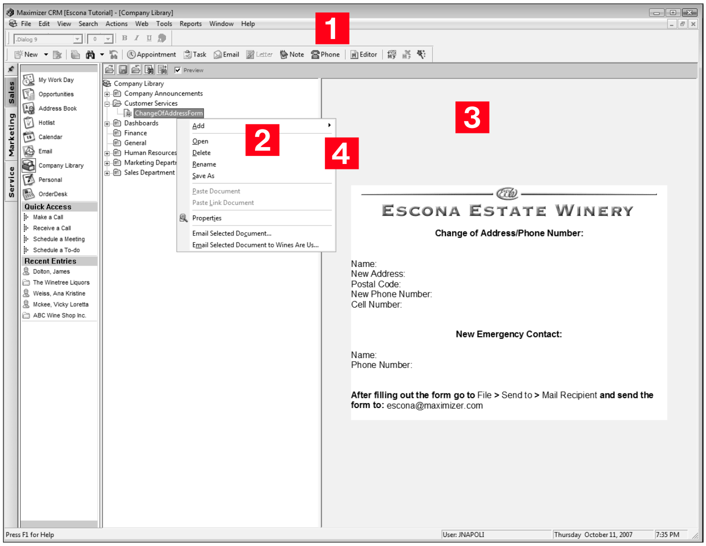
The Company Library window is divided into two panes: the left pane is a tree view, which displays the folders and files in your library; the right pane is a preview area, in which you see a preview of certain file types or type text notes.

➤ To share files in the Company Library

1. Use the toolbar for common tasks, like **Open File**, **Save Note**, **Close Note**, **Find**, and **Preview**.
2. The area in the left side of the window lists your folders and files in a tree view—much like Windows Explorer.
3. The area in the right side of the window displays a preview of most file types. You can also view and edit notes here.

   Deselect the **Preview** checkbox to display an icon rather than a preview.
4. Use the shortcut menu to perform common tasks in the window such as adding, deleting, or renaming files.
   - Save files on your computer or a network location by right-clicking on the file and choosing **Save As**.
   - Send documents by email by right-clicking on the file and choosing **Email Document** or **Email Document to [current entry]**. You can send multiple documents at one time by clicking on the documents while holding the Ctrl or

Shift key down and then choosing **Email Selected Documents** from the shortcut menu.



The Company Library can store many different file types. Provided that your system administrator has given you access to the Company Library, you can add files, folders, and notes as either private or public entries. If you use another word processor—such as Microsoft Word or Corel WordPerfect—for your correspondence, you can even open a document from the Company Library, merge it with one or more Address Book entries, and print or send it as an email message.

The easiest way to add an item to the Company Library is to right-click on the folder where you wish to place the new item, and select Add from the shortcut menu. You then choose which type of item to add to the folder:

- **Document** – Select this item to add a file. The file does not have to be a document, but the preview only works for documents.
- **Note** – Select this item to add a text-only document that you can write and edit in the preview pane.
- **Folder** – Select this item to add a new folder.

You can either create a new file using the associated application, or you can browse for an existing file on your hard disk drive or network. If you browse for a file, you can choose to either “link” or “embed” the file in the Company Library. Embedding is usually a better choice, as a link is only a “shortcut” to the original file, which may get moved, renamed, or may not be accessible to all Maximizer users.

Most file types are supported in the Company Library if you have the associated application installed on your computer. These include the following file types:

- .DOC and .RTF files – Microsoft Word
- .XLS files – Microsoft Excel
- .PPT files – Microsoft PowerPoint
- .HTM and .HTML
- .BMP files – bitmaps
- .TXT files – text and Company Library notes
- .JPG, .GIF, and .TIF files – graphic files
- .PDF files – Adobe Portable Document Format files
- .MXD files – Maximizer Documents
- .MSG files – Outlook Email Messages

Making Entries in Your Journal

The Journal window provides you with a location to keep personal records. Journal entries can be business activities, reference notes, and personal ideas. These entries are similar to notes, except they are not attached to Address Book entries.

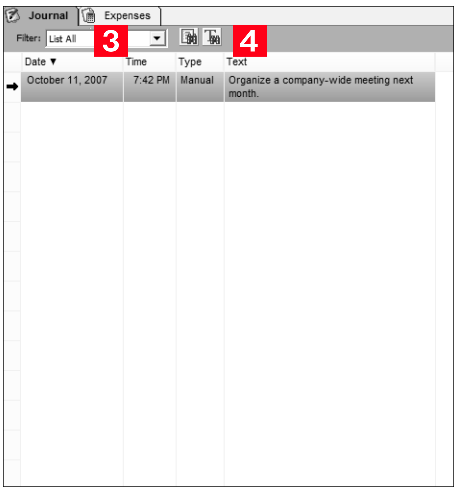
If you always want a journal entry to appear at the top of the list in the Journal window, type or select a date that is a few years in the future.

You can add journal entries up to 9,216 characters in length. By default, journal entries are stamped with today's date. You can change the date stamp if you want to add an entry for a past or future time period.

You can automatically log your Address Book activities as journal entries, and search most Maximizer note types from the Journal window, if you choose the Journal or Both options on the File > Users > [user ID] > Preferences > Logging tab.

➤ To use the Journal window

1. Select **Window > Journal**.
2. To add a journal note, right-click and select **Add Journal Note**.
3. Filter your journal entries by selecting one of the following items from the view filter—**List All**, **Today**, **Yesterday**, **This Week**, or **This Month**.
4. To search for a note by date range or text, click the corresponding search icon.



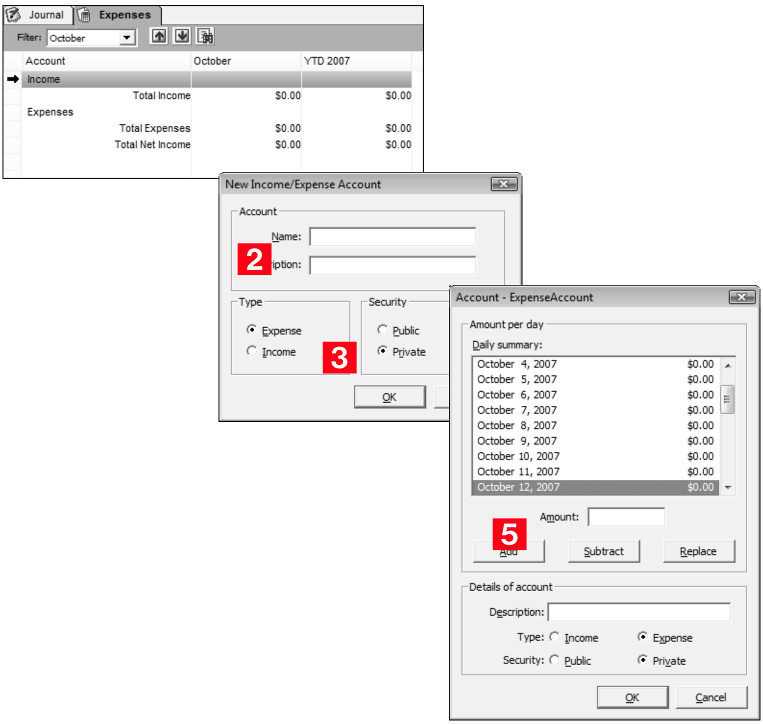
Monitoring Income and Expenses

Expense/income entries cannot be imported from another Address Book.

Use the Expenses window to record your income and expense items in separate accounts.

➤ To use the Expenses window

1. Select **Window > Expenses**.
2. Right-click in the window and select **Add Account**. Type a **Name** and **Description** for the entry.
3. Choose to make it an **Expense** or **Income**.
4. You can mark the entry as **Public** to let others see the entry.
5. Then open the account, choose the day to which the expense or income applies (the current day is the default), enter the dollar amount and choose to add, subtract, or replace the amount.

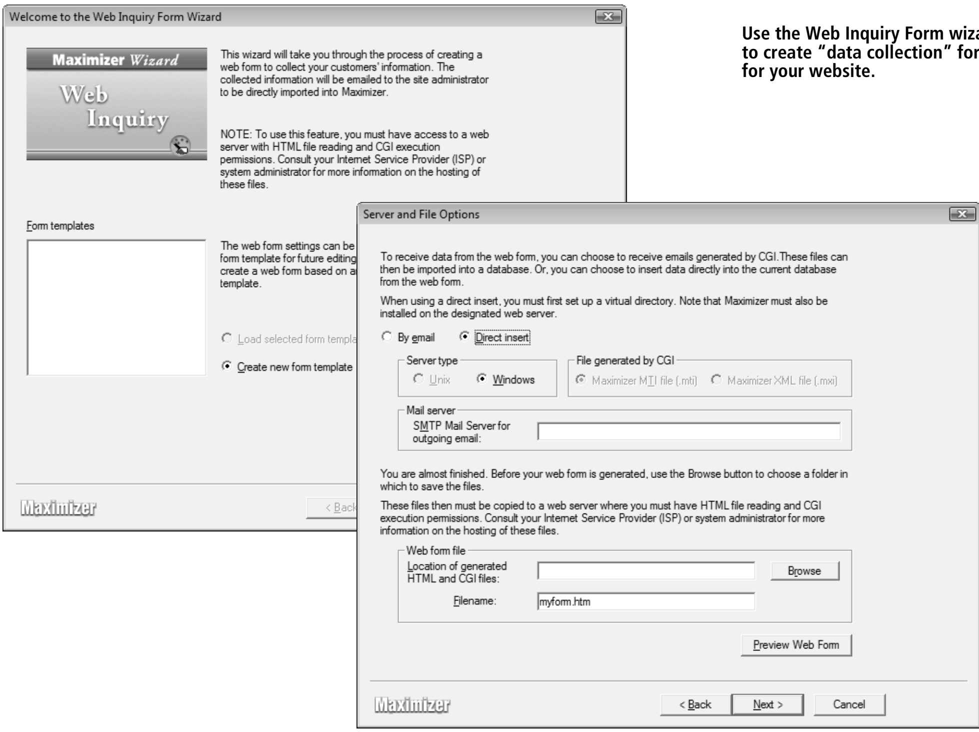


Creating Web Inquiry Forms for Your Website

When using a direct insert, you must first set up a virtual directory. Note that Maximizer must also be installed on the designated web server.

Maximizer can help you create an inquiry form to collect pertinent information from your website visitors. The collected information is sent to the specified email addresses as an .MTI or .XML file and then imported directly into Maximizer as Address Book entries by double-clicking on the file. You can also use a direct import (direct insert) of information.

Open the Web Inquiry Form Wizard by selecting Web > Create Web Form. Follow the instructions on each of the wizard pages.



Use the Web Inquiry Form wizard to create "data collection" forms for your website.

Use Maximizer's Web Inquiry Form wizard for the following tasks:

- Save the web form settings as a **template** for future editing, so you can customize the form as the need arises.
- Select the **Maximizer fields**, including user-defined fields, you want to appear on the form.
- Change **displayed field names**.
- Designate **mandatory fields**, in addition to the last name and email address fields.

- Create **rules to manage** when collected information is sent to the website administrator).
- Use HTML to customize the look of the areas above and below the **web form**.
- Use HTML to customize the **Success page** and the areas above and below the **Failure page**.
- **Preview** the web form and return to the respective wizard screens to make the required adjustments.

Maximizer Web Form Requirements

If you are creating forms using the Web Inquiry Form wizard in Maximizer, you must consider some mandatory circumstances regarding your Internet Service Provider (ISP). First, your ISP must support HTML file readings and CGI execute permissions. Second, if your ISP is running a UNIX server, you must ensure the ISP installs the following Perl modules:

- CGI
- Net::SMTP
- MIME::Base64

Third, you may have to ask your ISP to install the "winqcgi.pl" file into a folder that has execute permissions.

You may also have to modify the generated web form HTML page to target the winqcgi.pl file installed by the ISP. To do so, modify the following line:

<FORM action="winqcgi.pl" method="post" name="mtiform">

to

<FORM action="/cgi-bin/winqcgi.pl" method="post" name="mtiform">

Create Direct Insert Web Forms

You can set up your web forms so that they insert new entries directly into a Maximizer Address Book. In order to create direct insert forms, Maximizer must be installed on the web server that is hosting your web form.

➤ To create a direct insert web form

1. Create a folder for the web form.
2. Select **Web > Create Web Form**. The Web Inquiry Form Wizard starts.

3. Follow the instructions in the Web Inquiry Form Wizard. On the **Server and File Options** page, select the **Direct Insert** option.
4. Copy the form's .html files and the winqcgi.exe (for Windows servers) or winqcgi.pl (for Unix servers) file to the folder.
5. Launch IIS and create a virtual directory pointing to the folder. For more information on IIS and virtual directories, see the *Maximizer CRM Administrator's Guide*.

If your web server runs Windows 2003 Server, you also need to add a web service extension for the web form. See "Troubleshooting" chapter in the *Maximizer CRM Administrator's Guide* for details.

Using OrderDesk

Use the Address Book OrderDesk following window to view orders, inquiries, and sales quotes associated with the entries selected in the Address Book, Opportunities, or Customer Service window.

When you receive orders or inquiries from your website, you can manage them using the OrderDesk window. You can use the same OrderDesk window to enter, process, and manage orders that come to you by telephone, mail, or other methods. See "Managing Your Online Orders and Inquiries" on page 455 for more information.

You can also use the OrderDesk window to:

- Work with sales quotes.
- Create and edit catalog projects.

➤ To open the OrderDesk window

The OrderDesk icon is available only when the Sales tab is selected.

- Click the **OrderDesk** icon or select **Windows > OrderDesk**.

➤ To open the Address Book OrderDesk window

- Select **Windows > Address Book OrderDesk**.

If OrderDesk menu items are unavailable, enable OrderDesk as follows: Select File > Preferences, select the Enable OrderDesk option, and then restart Maximizer.

Work with Sales Quotes

Sales quotes are a valuable sales tool. Use OrderDesk to easily generate and manage sales quotes. You can later convert your sales quotes to orders.

The following sections show you how to:

- Generate a sales quote
- Create and insert item table merge fields

Generate Sales Quotes

You can generate sales quotes for Address Book entries, opportunities, or customer service cases. To generate sales quotes, use the Quote dialog box. You can access this dialog box from either the OrderDesk or the Address Book OrderDesk window.

The Quote dialog box has two tabs:

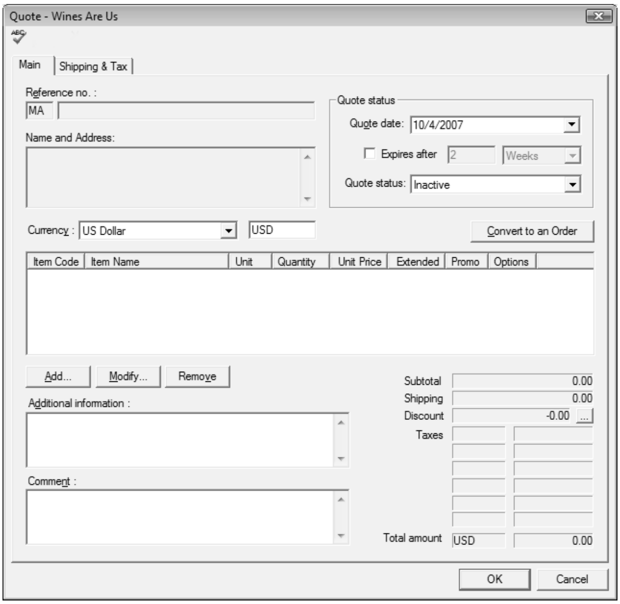
- **Main tab**. Use this tab to set up the sales quote. You can add items to use in the quote, specify the currency, set the quote status, and apply discounts to items.
- **Shipping & Tax tab**. Use this tab to record shipping information such as the name and address, shipping charges, and applicable tax information.

The following procedures show you how to set up a sales quote, apply discounts to items, add shipping and tax information, and save the sales quote.

➤ To set up a sales quote

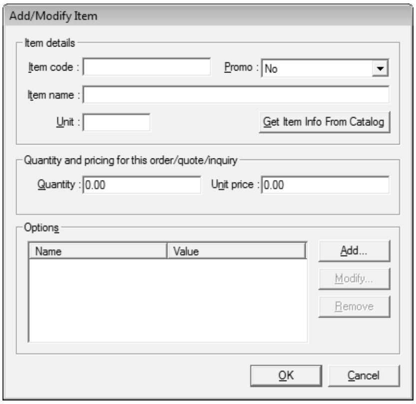
You must be in the OrderDesk or Address Book OrderDesk window to access OrderDesk menu items.

1. Select the Address Book entry, opportunity, or customer service case for which you are generating the sales quote.
2. Select **Edit > Add Quote**. The Quote dialog box opens.



3. If required, adjust the **currency**.
4. Specify values under **Quote status**.

5 Click **Add**. The Add/Modify Item dialog box opens.



6 Fill in item details, or click **Get Info from Catalog** to get this information from an existing catalog.

- The **Item name**, **Quantity**, and **Unit price** fields are mandatory fields.
- Click **Add** in the **Options** section to add information about an item, such as product color.

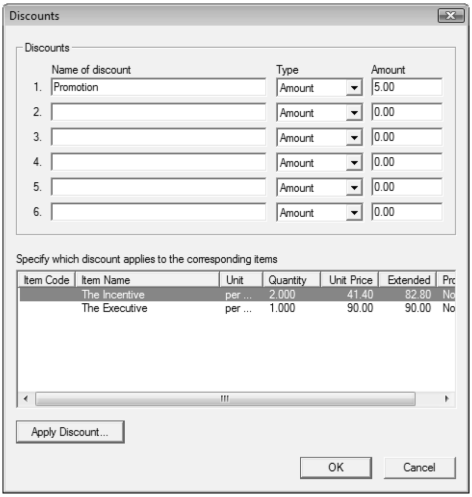
7 When you finish entering the item information, click **OK** to return to the Quote dialog box. The item is now displayed in the item list.

8 Optionally, add information and comments in the text boxes that are provided.

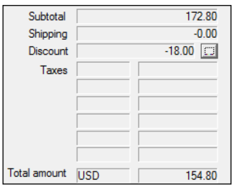
You can also apply discounts to items in the Order dialog box. (Select Edit > Add Order).

➤ To apply discounts to an item

1. On the Main tab, click the **ellipsis** button beside **Discount** (in the lower half of the dialog box). The Discounts dialog box opens.
2. Create discounts. For each discount, enter a discount name, select **Amount** or **Percentage** from the **Type** drop-down list, and enter an amount or percentage.



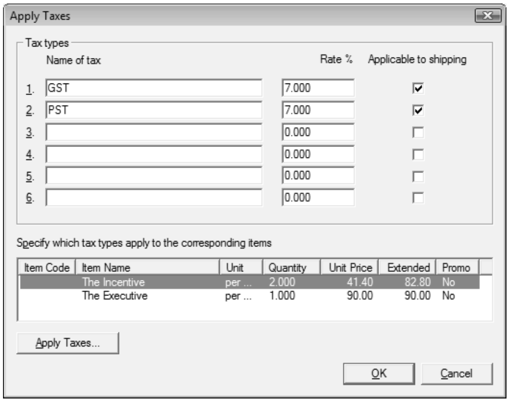
3. Select an item and click **Apply Discount** to apply a discount.
4. Click **OK**. The discount amount is displayed in the Discount field.



➤ To add shipping and tax information

1. Click the **Shipping & Tax** tab.
2. Under **Shipping details**, enter the information required to successfully ship the order. Click **Charges** to enter or change shipping costs.
3. Under **Tax details**, click **Apply Taxes**.

4 Define tax types. Enter a name for each tax type, and the tax rate (in percentage). Also specify whether the tax is applicable to shipping.



5 Select an item and click **Apply Taxes** to apply the relevant taxes.

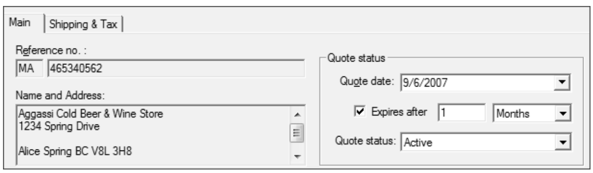
6 Click **OK** to close the Apply Taxes dialog box.

7 Enter shipping address information manually or click **Retrieve** to automatically retrieve it from the selected entry.

➤ To save a sales quote

- After you finish creating the sales quote, click **OK**. The sales quote is generated and saved to the selected entry.

  When you open the sales quote, you can see that a reference number has been automatically generated.



Create and Insert Item Table Merge Fields

You can create item table merge fields for use with Microsoft Word documents. When you insert one of these merge fields, an item table is added to your document.

The item table contains the columns you selected when creating the merge field. The following columns are available to select: Item Name, Item Code, Item Promotion, Item Price, Item Unit, Item Quantity, Item Shipping Cost, Item Extended Price, Item Options (Line separated), and Item Options (Comma separated). The table

also contains a row for each product/service item in the sales quote selected for the merge.

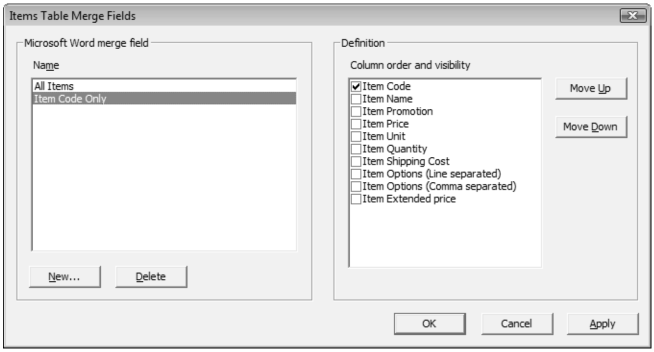
For example:

All Items						
Item Code	Item Name	Item Promotion	Item Price	Item Unit	Item Quantity	Item Shipping Cost
237892	The Executive	No	90.00	per basket	1	5.00
245698	1997 Zinfandel	No	19.00	each	1	5.00

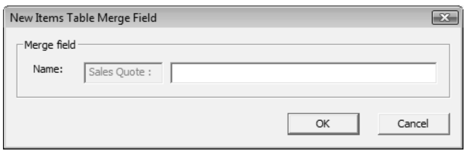
The following procedures show to how to create, delete, and insert item table merge fields.

➤ To create a merge field

1 In the OrderDesk or Address Book OrderDesk, select **Edit > OrderDesk - Item Table Merge Field Setup**.



2 Click **New**.



3 Enter a name for the merge field and click **OK**. Note that the prefix "Sales Quote" is added to every name. This helps you to locate your merge fields in the Insert Merge Fields dialog box.

4 In the **Definition** list, select the table columns you want to add to the merge field. To select a table column, click the checkbox beside it.

5 If necessary, use the **Move Up** and **Move Down** buttons to arrange the column order. The column order in the list represents the column order in the merged table.

6 Click **OK**.

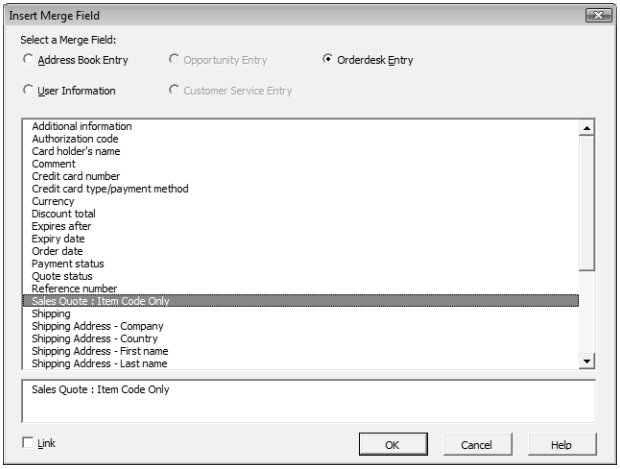
➤ To delete a merge field

1. In the **Microsoft Word merge field** list, select the merge field you want to delete.
2. Click **Delete**. Click **OK** to confirm that you want to delete the merge field.

➤ To insert a merge field

Orders, which contain the same fields as sales quotes, can also be selected.

1. In the OrderDesk window, select a sales quote.
2. Open a Microsoft Word document.
3. On the Maximizer toolbar, click the **Insert Merge Field** button.
4. Select the **OrderDesk Entry** option and select the merge field you want to insert.



5. Click **OK**. Information from the selected sales quote is merged into the document.

Create and Edit Catalogs

You can use OrderDesk to create and edit online catalogs as follows:

- Add or delete catalogs
- Add, modify, or delete catalog sections
- Add, modify, or delete catalog items

To perform these tasks, use the Product Catalog dialog box.

➤ To open the Product Catalog dialog box

- In the OrderDesk or Address Book OrderDesk window, select **Edit > Product Catalog**.

Add or Delete Catalogs

➤ To add a new catalog

1. Click **Add**.
2. In the **Project Title** box enter a name for the catalog.
3. In the **Description** box, enter a catalog description.
4. Click **OK**. The catalog is added to the **Select a Catalog** list.

➤ To view or modify catalog properties

- Click **Properties** to view or modify the catalog name and description.

➤ To delete a catalog

1. In the **Select a Catalog** list, select the catalog you want to delete.
2. Click **Delete**, and then click **Yes** to confirm the deletion.

Add, Modify, or Delete Catalog Sections

Before adding, modifying, or deleting catalog sections, select the catalog you want to work with.

➤ To add a catalog section

1. In the **Select a Catalog** list, select a catalog.
2. Click **Add**.
3. In the **Catalog Section Title** box, enter a name for the section.
4. Enter a discount rate and a description of the discount, if required.
5. Click **OK**. The section is added to the **Catalog Sections** list.

Use the Up and Down buttons to organize the folders in the Catalog Sections list.

➤ To modify a catalog section

1. In the **Catalog Sections** list, select the section you want to modify.
2. Click **Modify**.
3. Modify the information and click **OK**.

➤ To delete a catalog section

1. In the **Catalog Sections** list, select the section you want to delete.
2. Click **Remove**.
3. Click **Yes** to confirm the deletion. The section is removed from the list.

Add, Modify, or Delete Catalog Items

Before adding, modifying, or deleting catalog sections, select the catalog you want to work with.

➤ To add a catalog item

1. In the **Select a Catalog** list, select a catalog.
2. In the **Catalog Sections** list, select the catalog section you want to add the item to.
3. Under the **Catalog Items** list, click **Add**.

4. In the **Product/Services** box, enter a name for the item.
5. Fill in other details as required. Note that **Regular Price**, in the **Enter the Pricing Details** section, is a required field.
6. Click **OK**. The item is added to the **Catalog Items** list.

If you deselect an item in the Catalog Items list, the item will not be available when you use the Get Item Info from Catalog button in the Order or Quote dialog box.

➤ To modify a catalog item

1. In the **Catalog Items** list, select the catalog section that contains the item you want to modify.
2. Click **Modify**.
3. Modify the information and click **OK**.

➤ To delete a catalog item

1. In the **Catalog Items** list, select the item you want to delete.
2. Click **Remove**.
3. Click **Yes** to confirm the deletion. The item is removed from the list.

Import and Export Catalog Items

You can import and export catalog items in Maximizer.

➤ To import or export catalog items

1. Open the OrderDesk window or the Address Book OrderDesk following window.
2. From the **Edit** menu, select **Import/Export Catalog Items**.
3. Select the catalog to which you are importing or exporting items.
4. Follow the wizard instructions to import or export the catalog items, clicking **Next** after each screen.
5. Click **Finish** in the last wizard screen.

Maximizer CRM Gadgets

If your computer uses Microsoft Windows Vista™, you can add the following Maximizer CRM gadgets to Windows Sidebar: the Address Book gadget and the Sales Dashboard gadget. You add the gadgets from the Gadget Gallery, where all installed gadgets reside.

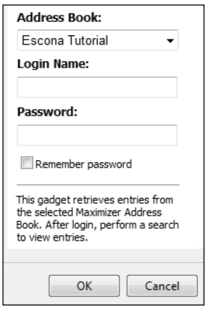
➤ To add a Maximizer CRM Gadget to Windows Sidebar

1. Click the plus sign at the top of Windows Sidebar to open the Gadget Gallery.
2. Double-click the Maximizer CRM gadget you want to add. The gadget is now docked to Windows Sidebar.

To remove a gadget from Windows Sidebar, point to the gadget and click the Close button that appears at the top in the upper-right corner.

➤ To log into a Maximizer CRM Gadget

1. Point to the gadget and click the Options button that appears second from the top in the upper-right corner. Or right-click in the gadget and select **Options**. The Settings page opens.



2. Select an Address Book, enter your **Login Name** and **Password**, and then click **OK**.

Work with the Address Book Gadget

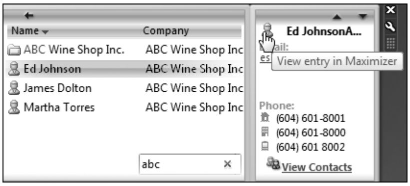
Use the Address Book gadget to quickly search for and view Address Book entries and contact information.

- To search for Address Book entries, enter search text and click the drop-down arrow to select a search category (last name, first name, company, or phone number). The entries that match the search criteria are displayed.

In the detail view, click the Up and Down arrows to move from entry to entry. Click the horizontal arrow to return to the entry list.

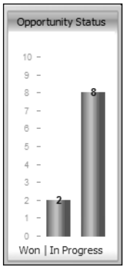
- Click an entry to display details such as email addresses and phone numbers. Click an email address to send an email message to a customer. To view all contacts related to the entry, click **View Contacts**.

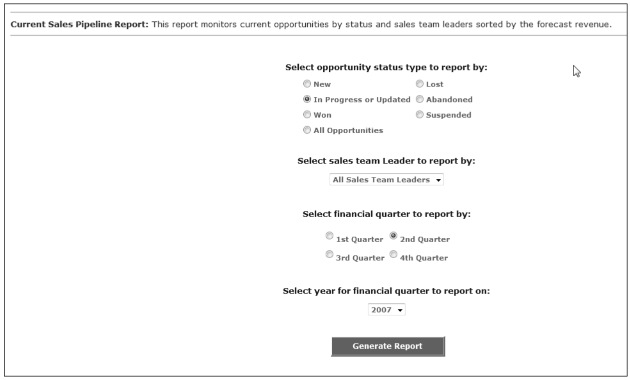
- Drag the Address Book gadget from Windows Sidebar to display both the list and details in the gadget window.
- When the gadget window is expanded, you can click any column header in the entry list to sort by the information in that column.
- To view an entry in Maximizer, select the entry and click the **View entry in Maximizer** icon.



Work with the Sales Dashboard Gadget

Use the Sales Dashboard gadget to view opportunity indicators (won and in progress) in a Dashboard format. Click an indicator to drill down to more detailed information.





CHAPTER 4

Communicating with Your Customers

In this chapter...

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"Working with Documents and Templates" on page 125

"Broadcasting Documents Using Mail Merge" on page 132

"Setting Up Maximizer to Use Email" on page 134

"Sending and Receiving Email" on page 137

"Integrating Maximizer and Outlook" on page 141

"Synchronizing Address Book Entries with Microsoft Outlook" on page 152

"Keeping Records of Your Telephone Calls" on page 159

Keeping in Touch with Your Customers

For more information on using the Maximizer Word Processor and the Documents window, see the Maximizer Help.

Maximizer makes it easy to maintain good communication with your customers. You can send email, letters, and faxes to any of your Address Book entries. When you want to make a phone call, Maximizer will show you the number to dial, or if you have a modem, Maximizer can dial the number for you. Any communications—via mail, the Internet, or telephone—can be logged and tracked in Maximizer.

The Email window works with many popular email service provider applications, such as Microsoft Outlook and others. This means that if you already use one of these service providers, you have access to the powerful email features in Maximizer.

You can make a phone call from Maximizer by selecting the Address Book entry you want to phone and clicking the Phone button in the toolbar. As you make the call, Maximizer lets you keep notes on your conversation as it's happening.

With the Documents window, you can keep any documents or files you send to an Address Book entry, or store any files that are somehow related to your activities with an Address Book entry.

If you prefer to use another word processor, Maximizer integrates with both Microsoft Word and Corel WordPerfect.

Working with Documents and Templates

To create documents and templates, you can use the Maximizer Word Processor, which is always installed as part of Maximizer. You also have the option of using Microsoft Word or Corel WordPerfect as your word processor.

Use the Maximizer Word Processor

The Maximizer Word Processor is a separate application with a toolbar and menus that are similar to other commonly used word processors.

To run a spell check, with the document or template open in the Maximizer Word Processor, place your cursor at the top of the page, and then select Tools > Spell Check or click the Spell Check button on the toolbar.

➤ To create a document

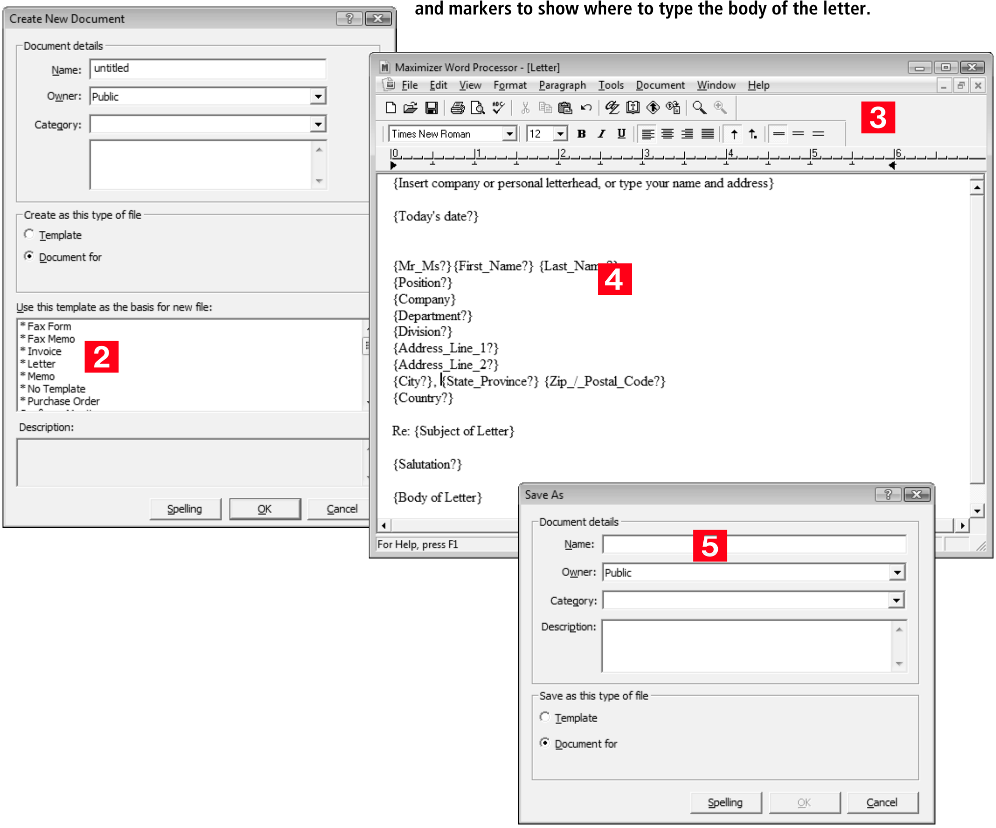
1. Launch the Maximizer Word Processor in one of the following ways:
   - Drag an Address Book entry to the Documents window.
   - Click the **Editor** button or the **Letter** button on the Standard toolbar.
   - Select an **Address Book entry** and click the **Letter** button.
   - Press **F8**.
   - Select **Tools** > **Maximizer Word Processor**.
   - Select **Actions > Write a Letter**, **Write a Fax**, or **Write a Document**.

The word processor includes fax, invoice, letter, and memo templates. You can customize these templates or create your own custom templates. For more information on templates, refer to "About Templates and Documents" on page 126.

2. Select **File** > **New** if you want to create the document based on one of the word processor's templates. Enter the document's name now or enter it when you save the document.
3. Use the **toolbars** for common tasks and formatting text and paragraphs.
4. If your template has **merge fields**, the information for the selected Address Book entry—like the address—is inserted in place of the merge fields.

5 When you are finished, select **File > Save As** and enter a name for the document. You can also specify the owner of the document, select a document category, and choose whether to save it as a template. If you have already specified the name, select **File > Save**.

In this sample letter, the template includes merge fields and markers to show where to type the body of the letter.



About Templates and Documents

Understanding how templates and documents are used and how they communicate with each other is the key to working efficiently with this correspondence system.

Templates

A template is a standard design meant to be used repeatedly to create new documents. Templates are generally designed to be used with a company's stationery, including default page margins, standard fonts, and merge fields.

For example, a template might be used for the following:

- Create form letters for bulk mailings to clients and prospects.
- Provide a default structure for letters and faxes.
- Provide a consistent company image.

You can create a template in the Maximizer Word Processor by designing a document then selecting “Template” when you save your work. When you next create a new document, you can use your saved template as the basis for the document. You can also customize existing templates to suit your needs.

Documents

A Maximizer Word Processor document is always specific to an Address Book entry, customer service case, campaign, or opportunity. Typically, documents are created from one of the templates created with the word processor. A document can be a letter, a fax, a flyer, or anything you write with the word processor and send by mail, fax, or email.

Location of Templates and Documents

When you use the Maximizer Word Processor to save your templates and documents, they are automatically stored in the Microsoft SQL or Microsoft SQL Express database, not the Address Book folder. Therefore, they can be viewed only through the Maximizer Word Processor and not Windows Explorer or another file management tool.

Use Microsoft Word or Corel WordPerfect

You can use Word or WordPerfect as your word processor. Both applications are fully integrated with Maximizer.

Ensure Word or WordPerfect is installed prior to installing Maximizer. Maximizer adds a button to the Maximizer custom toolbar for launching your word processor, and adds a set of Maximizer buttons to the toolbar in the word processor itself.

If you want to use the template files associated with WordPerfect or Microsoft Word, when installing Maximizer, select the Custom installation option. In the features dialog box, choose the related option.

Maximizer Macro Security Setting

While some of your personal macros may require a "medium" security setting to run, Maximizer macros can operate in Word with a "high" security setting. To adjust your macro security setting, go to Tools > Macro > Security and make your selection in the Security Level tab.

After installing Maximizer, and the first time you open Word, you will be prompted to trust the Maximizer macros. Simply select the "Always trust macros from this source" option and click the Enable Macros button; the dialog box will not appear again.

Unlinking Merge Fields in Word

Dynamic links are created in the Word document only if the the Link checkbox is selected in the Insert Merge Field dialog box. For more information on inserting merge fields, refer to "Use Merge Fields in Document Templates" on page 129.

You can insert merge fields from Maximizer into a Word document by using the embedded Maximizer toolbar. The links between the Maximizer fields and the corresponding fields in the Word document are dynamic, which means that the field values in the document change depending on which Address Book entry is selected.

If you do not want the document's merged values to change when a different Address Book entry is selected, you can break the merge field links by performing the following procedure.

➤ To keep fields from changing when a different Address Book entry is selected

1. Highlight the entire Word document by selecting **Edit > Select All**.
2. Press **Ctrl+Shift+F9**.

Use Merge Fields in Document Templates

Ensure the start and end of the merge field reside on a single line. The start of a merge field is denoted by the left brace ({) character and the end of a merge field is denoted by the right brace (}) character.

Merge fields are simply place-holders in your document that can be replaced by basic Address Book entry or user-defined field information when you perform a merge. For example, in the body of a letter, you can insert a merge field for a Contact's name:

{First_Name?}

When you perform the merge, the name of each recipient will display in place of the merge field. If the entry does not have an assigned value for the chosen merge field, the field does not display.

Merge fields are not restricted to Address Book entry information—you can insert merge fields for your own user information, opportunities, customer service cases, and OrderDesk information as well.

Note that you can create document templates with merge fields from Maximizer in Microsoft Word or Corel Word Perfect. Follow the steps listed below using the Maximizer toolbar embedded in the word processor to insert the merge fields. In the steps listed below, we are using the Maximizer Word Processor.

Hold your mouse over a button to view its description. The merge field button is the first button on the left of the toolbar.

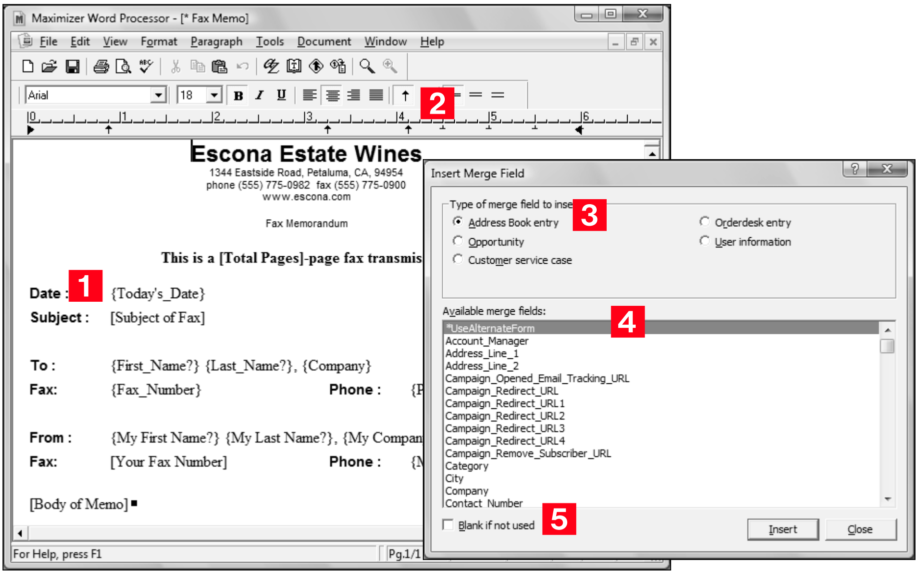
➤ To insert a merge field

1. With a document open in the Maximizer Word Processor, place your cursor where you want to insert a merge field.
2. Select **Merge Field** from the Maximizer Word Processor **Tools** menu, or click the **Merge Field** button on the toolbar.
3. In the Insert Merge Field dialog box, select the type of merge field you would like to insert.
4. Select a merge field from the list and click the **Insert** button. The selected merge field is inserted in the template.

5 Select the **Blank if Not Used** checkbox if you prefer. During a mail-merge, this option leaves a blank space if there is no information available for a field. (By default, if there is no information in the field, the Maximizer Word Processor simply omits the field and leaves no space; it also adjusts the position of the other merge fields accordingly.)

6 Repeat steps 3–5 for each merge field you want to add.

7 When you are finished, click **Close**.



Insert Files into the Documents Window

You can bring into Maximizer files that you created in other application such as Microsoft Word, Microsoft Excel, Microsoft Paint, and Adobe Acrobat, to list a few.

If you want workstations other than your own to access a linked file, make sure that the file resides in a location they can access. When inserting the file, specify the full UNC path. For example: \\[server name]\Documents folder\maximizer.doc.

You can either embed or link the files. When you embed a file in the Documents window, the file is stored right in the Address Book. A linked file, on the other hand, is saved elsewhere on your computer or network, and only a link to the source file is stored in the Address Book.

1. In a controlling window, click the entry to which to add the file.
2. Select **Insert File** from the **Edit** or shortcut menu.
3. Enter a **Name** and **Owner** of the file. Select your user name in the **Owner** field if you do not want to share the file with other users. If you want to link the file, select the **Link** checkbox.
4. Click **Browse** to browse to the file you want to insert. Select the file and click **Open**.

   The file is inserted in the Documents window.

You can also insert files that have been copied to the Windows Clipboard (e.g., from Windows Explorer) by right-clicking in the Documents window and selecting **Paste Link**.

Broadcasting Documents Using Mail Merge

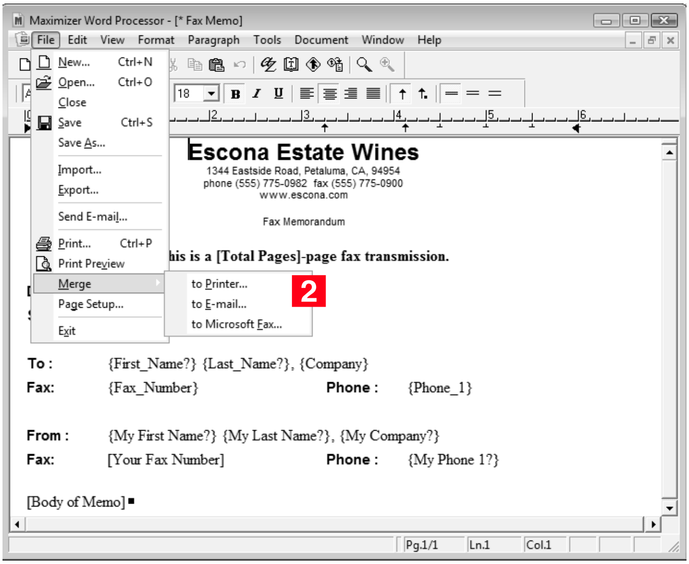
If you wish to send a letter, an email message, or a fax to many recipients, the Maximizer Word Processor's mail merge is the tool to use. The merge feature allows you to send a single document to multiple Address Book entries by fax, email, or regular mail. This type of merge is called a "broadcast" merge.

To find out how to insert merge fields into a template, see "Marketing with Automated Campaigns" on page 197.

Because the word processor has merge fields for your Address Book information, you can create a document with a merge field in place of a specific name. These merge fields are replaced with the recipient's information when you perform the merge and send the document.

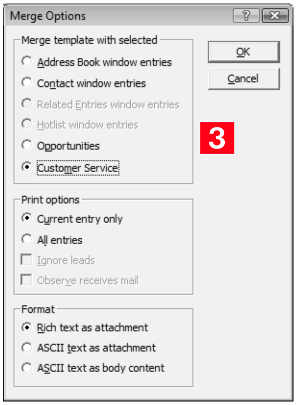
➤ To send a mail merge

1. To send a document in a broadcast merge, you first create a list of Address Book entries that should receive your merged document. You can create a list by searching for the appropriate entries or simply selecting entries in your current list.
2. In the Maximizer Word Processor, select **File** > **Merge** > **to Printer**, **to Email**, or **to Microsoft Fax**. You can also send a mail merge from Microsoft Word or WordPerfect using the Maximizer toolbar embedded in the word processor to insert the merge fields.



3 Specify your merge options. Depending on what window you have active, the available merge entries vary. Click **OK** to continue with the merge.

4 Select **Print** or **Send** to merge the document with the first entry in your selected list of entries, or select **Send All** or **Print All** to merge the document with all of your selected entries. Click the **Skip** button to go on to the next entry.



Setting Up Maximizer to Use Email

The Email window in Maximizer provides you with the ability to send and receive email within Maximizer. The Email window works with your existing email system so that you can take advantage of some of the benefits of sending and receiving email. Maximizer allows email file attachments and supports the vCard standard for virtual business cards. You can send files, mail-merge documents, and vCards quickly and easily.

Maximizer's Email window works much the same as any email application, but has additional functionality that enables you to easily integrate your Address Book entries with your email.

Supported Email Clients

To use these features, you must already have a Messaging Application Programming Interface (MAPI) or VIM (Vendor Independent Messaging) email client. Email clients that should work with Maximizer when properly configured include those listed below.

- Lotus cc:Mail
- Lotus Mail
- Lotus Notes
- Microsoft Exchange Sever
- Microsoft Outlook/Microsoft Outlook Express
- Novell GroupWise

Please see the Maximizer website at www.maximizer.com for the latest version information of compatible email programs.

Use Novell GroupWise and Lotus cc:Mail/Mail

If you are using Novell GroupWise, Lotus cc:Mail (MAPI), or Lotus Mail (MAPI), select the corresponding option in Maximizer's Advanced Email Preferences (File > Preferences > Email tab). If you do not select the correct option, a program fault error will occur when using the Email window. For Lotus cc:Mail and Lotus Mail, you also must have the "Override Extended MAPI" option selected in the File > Preferences > Email tab.

Use Microsoft Outlook Express

Because Outlook Express is a Simple MAPI program, the Maximizer Email window shows the contents of the Outlook Express Inbox only. To use Outlook Express with Maximizer, you must configure settings in both Maximizer and Outlook Express, as described in the following procedures.

➤ Step 1: To Configure Maximizer for Outlook Express 6.x

1. Start Maximizer. If necessary, open the **Address Book** you use.
2. Select **File** > **Preferences**.
3. Select the **Email** tab.
4. Enable the **Override extended MAPI** option.
5. Click **Advanced**.
6. Select **Other email system** and click **OK**.
7. Click **OK** to close the Preferences window.
8. Close Maximizer.

➤ Step 2: To Configure Outlook Express 6.x for Maximizer

1. Start Outlook Express.
2. Select **Tools** > **Options**.
3. On the General tab, click the **Make Default** button beside **This application is NOT the default Mail handler**.

   If the button is unavailable, and the option says **This application is the default Mail handler**, then you can proceed to the next step because Outlook Express is already the default Mail handler.
4. Click **Apply**, and then click **OK**.

   Windows may prompt you to restart your computer.

   Maximizer is now integrated with Outlook Express.

Use Microsoft Outlook

Maximizer cannot use Extended MAPI with the Internet Mail Only installation type. Ensure the installation type is Corporate or Workgroup.

Outlook 2007, Outlook 2003, Outlook 2002, and Outlook 2000 are Extended MAPI programs. This means the Maximizer Email window will show the same folders as Outlook.

➤ To use Outlook with Maximizer

1. In Maximizer, select **File** > **Preferences**.
2. Select the **Email** tab.
3. Find the **Override Extended MAPI** option and verify this setting is disabled (the checkbox should be cleared).
4. Click **Apply**, then **OK**.
5. Exit Maximizer.
6. Restart Maximizer.

When you select the Email window (Window > Email), folders such as Inbox, Outbox, Sent Items, Deleted Items, and your personal folders are displayed.

For more information on configuring Maximizer for Outlook Synchronization, refer to the *Maximizer CRM Administrator's Guide* and to Maximizer Help.

Sending and Receiving Email

Both Maximizer and Administrator are used to control email preferences. Select File > Preferences to open the Preferences dialog box.

You can use Maximizer's Email window to send and receive email using your existing email system. You can also send email to Address Book entries directly from Maximizer's main windows.

By default, the Send Email dialog box opens when you compose, reply to, or forward email messages from Maximizer. However, if you disable the "Always display the Send Email options before composing email" option in preferences, this dialog box opens only if you use File > Send Email. Otherwise, the Compose Email Message dialog box opens directly, and default preferences for sending the message are used.

To send email to Address Book entries or users when scheduling appointments, see "Add New Appointments to Your Calendar" on page 89."

Use the Email window

The Email window works much the same as any standard email application, but has additional functionality that enables you to easily integrate your Address Book entries with your email messages. Using drag and drop you can quickly associate an email message with an existing entry in your Address Book or create a new entry in a few simple steps. You can also create appointments and Hotlist tasks by dragging email messages to the Calendar window or to the Calendar or Hotlist icon.

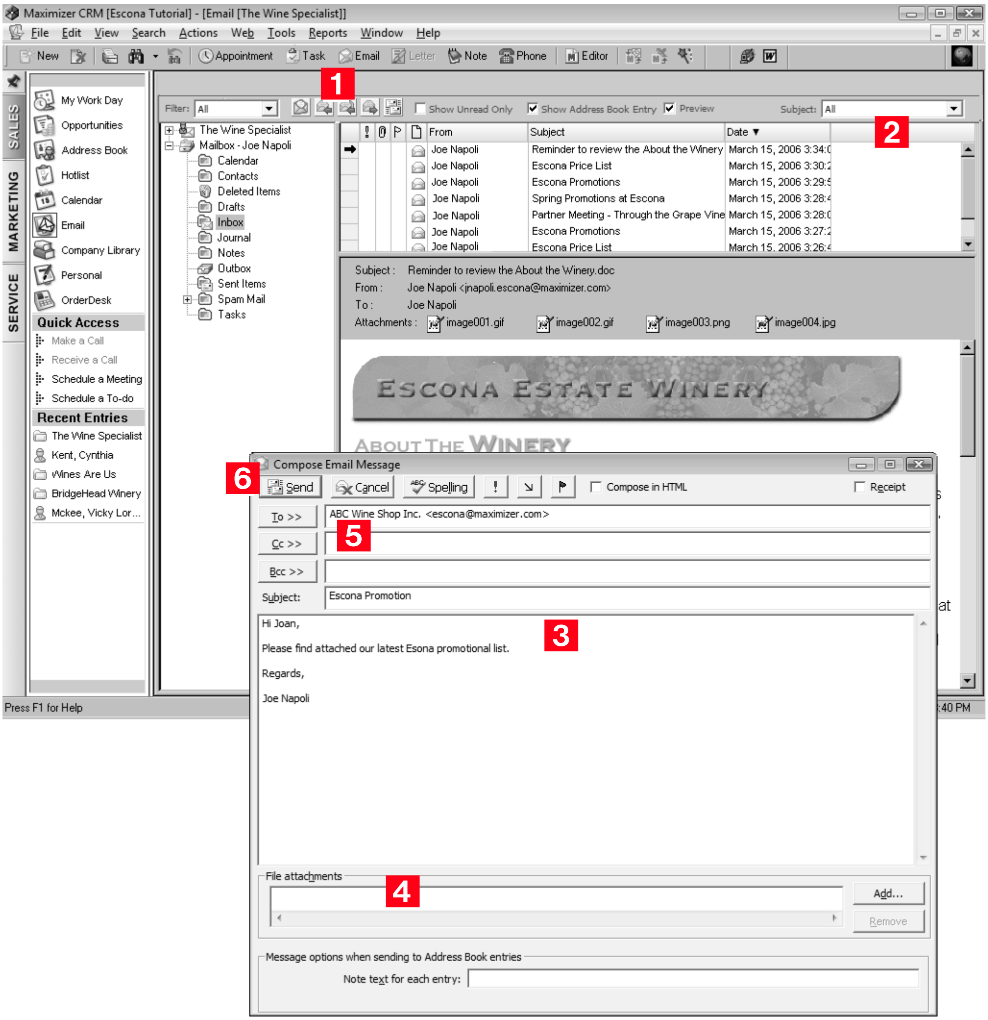
➤ To send an email message

1. Click the **Compose** button in the Email window. The Send Email dialog box opens.

2. If necessary, adjust the Send Email options. Click **OK**. The Compose Email Message dialog box opens.
3. Compose your email message. Select the **Compose in HTML** checkbox if you want to use HTML formatting.
4. To attach a file, click **Add** under **File Attachments**.

5 Use the **To, Cc**, and **Bcc** buttons to select the recipients of the email message. If you are sending an email message to a single recipient, you have the option of choosing a Maximizer Address Book entry or an Outlook contact.

6 Click **Send**.

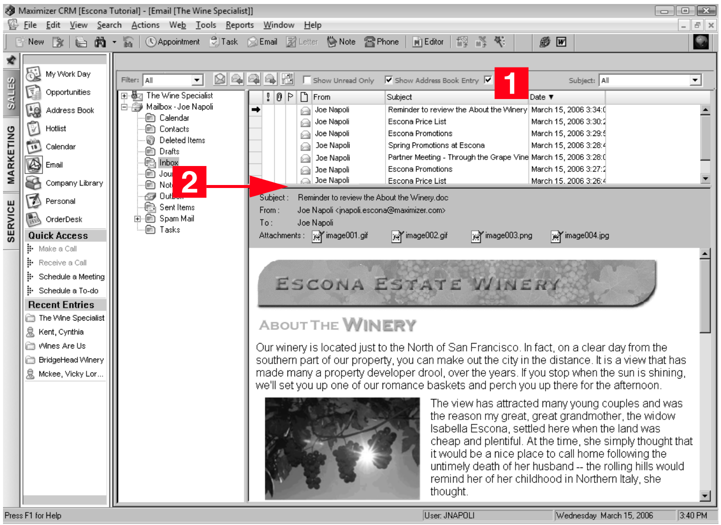


Email Preview Pane

You can preview email in the Email window just as you would in other email applications. To adjust the size of the preview window, move the upper preview border up and down.

➤ To use the email preview pane

1. In the Maximizer Email window, select **View > Preview** or select the **Preview** checkbox in the view bar of the **Email** window. By default, the preview pane is turned on.
2. Adjust the size of the preview window by moving the upper preview border up and down.



Send Email Messages to One or More Address Book Entries

You can quickly write an email message to one or more Address Book entries from any of the main Maximizer windows: Address Book, Opportunities, Customer Service, or Campaigns. You can also log the email message to selected Address Book entries.

➤ To send an email message to one or more selected entries

See "To send an email message" on page 137 for more detail on composing email messages.

If you want to save a generic note to each Address Book entry, enter the text in the "Note Text for Each Entry" box.

1. To send a message to one selected entry, click the **Email** button. To send a message to multiple Address Book entries, select **File > Send Email**. The Send Email dialog box opens.
2. If necessary, adjust the Send Email options. Click **OK**. The Compose Email Message dialog box opens.
3. Compose the message and click **Send**.

Create Appointments and Tasks from Email

You can create an appointment or a task directly from the Email window in Maximizer. You can create the appointment or task for the Address Book entry associated with the email message or for the currently selected Address Book entry, customer service case, opportunity, or campaign. You can also create a personal appointment or task that is not associated with an entry.

The subject of the email message becomes the subject of the appointment or the activity of the task. The body of the email message becomes the body note of the appointment.

➤ To create an appointment or a task from an email message

1. In the Email window, select the email message you want to create an appointment or a task for.
2. Do one of the following:
   - To create an appointment or task associated with an entry: from the **Edit** or right-click menu, select **Create a New > Appointment/Task for <entry>**.

     Depending on the email message, you can select either the Address Book entry associated with the message or the currently selected Address Book entry, customer service case, opportunity, or campaign.
   - To create a personal appointment or task: from the **Edit** or right-click menu, select **Create a New > Personal Appointment/Task**.
3. Enter the appointment/task details and click **OK**.
4. To save the email message as a document with the entry, specify the properties of the document and click **OK**.

For more information on appointments and tasks, see "Tracking Your Appointments and Hotlist Tasks" on page 84.

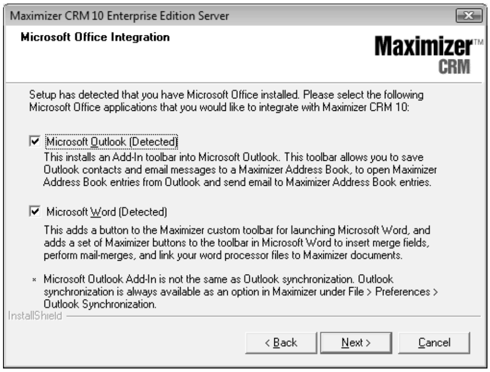
Integrating Maximizer and Outlook

Outlook integration works with Outlook XP, 2003, or higher. It does not work with Outlook Express.

If Outlook integration is installed and configured, you can use it to save Microsoft Outlook contacts and email messages to a Maximizer Address Book, to open Maximizer Address Book entries from Outlook, to send email to Maximizer Address Book entries, and to create customer service cases from email messages in Outlook.

Outlook integration is not the same as Outlook synchronization. For information about Outlook Synchronization, refer to "Synchronizing Address Book Entries with Microsoft Outlook" on page 152.

A typical installation of Maximizer installs Outlook integration by default if the necessary version of Microsoft Outlook is installed on the machine. The following installation screen determines whether Outlook integration is installed.



If you are using Word as your email editor, the Maximizer Addresses button may not be available in the New email message window. For more information, go to page 148.

Outlook integration installs the following toolbars in Outlook.

Toolbar	**Outlook Window**	**Buttons**
	Mail (Inbox and other incoming email folders.)	• Save Contact to Maximizer • Create Customer Service Case • Save Email to Contact in Maximizer • View Contact in Maximizer
	New email message	• Send Email and Save to Contact in Maximizer • Maximizer Addresses
	Contacts	• Save Contact to Maximizer • Create Customer Service Case (disabled) • Save Email to Contact in Maximizer (disabled) • View Contact in Maximizer
	Contact information	• Save Contact to Maximizer • View Contact in Maximizer

If you are set up for synchronization with Outlook and you create a Contact through the buttons in Outlook, the Contact is added to the Favorite List and synchronized from that point forward.

If you don't see the Outlook integration buttons on the Outlook toolbar, select View > Toolbars, and make sure "Maximizer Add-In" is checked.

Before you can use Outlook integration, you must specify which Address Book to save the contacts and email messages to, as described below.

Specify a Maximizer Address Book for Outlook Integration

Each Windows user can integrate Outlook with only one Maximizer Address Book on a single machine.

If you use Maximizer on more than one machine, you must specify the Address Book for integration on each machine. If you want, you can specify a different Address Book for integration on each machine.

If multiple users log in to the same machine using different Windows login accounts, each user must specify the Address Book for integration in Maximizer on that machine.

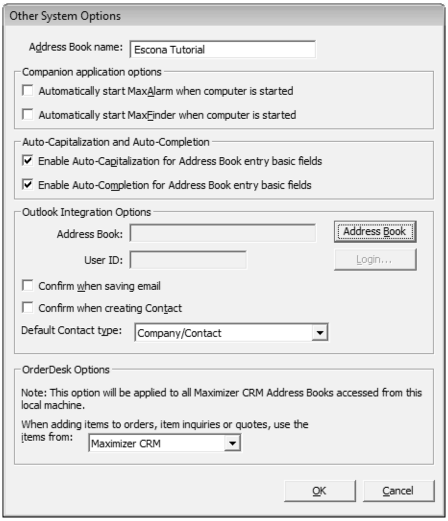
➤ To specify an Address Book for integration

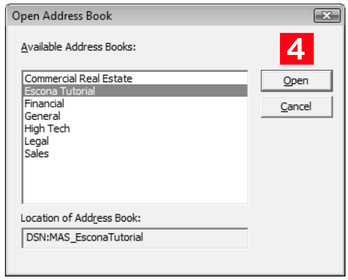
1. In Maximizer, select **File** > **Preferences** and click the **Other Options** button on the System Defaults tab.
2. Click **Address Book**.
3. If the option is available, choose to display the local or global Address Book list.
4. Select the Address Book to integrate with Outlook, and click **Open**.
5. Enter your **User ID** and **Password** in the Login dialog box.

   If your Maximizer password changes, or if you ever need to change the User ID you use for Outlook integration with Maximizer, open the Other System Options dialog box, click the Login button, and change your login credentials.

Only one Address Book can be integrated with Outlook at a time.

6 Click **OK** to close the Login dialog box, and click **OK** again to close the Other System Options dialog box.





Select the Outlook Address List to Integrate with Maximizer

Outlook integration with Maximizer only works with address lists in the Outlook Address Book (such as Contacts), and only with one address list at a time. It does not work with the global address list or other address lists.

If Outlook is set to use the global address list or another address list, which might be the case if your organization uses Microsoft Exchange, you will see an error message when you try to save an Outlook contact to Maximizer. If you see such an error message, use the procedure below to select an Outlook address list.

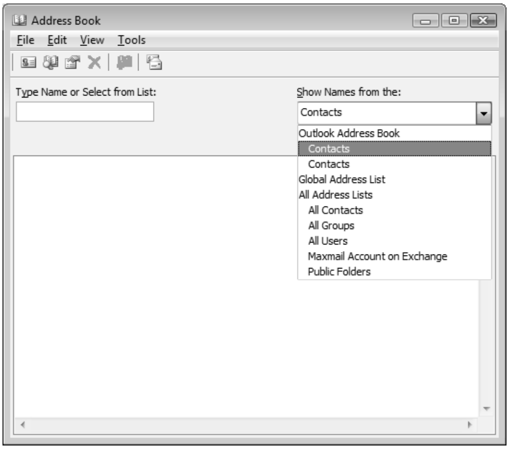
➤ To select an Outlook address list

1 In Outlook, select **Tools** > **Address Book** from the menu.

2 In the Address Book dialog box, select **Tools** > **Options**.

3 Open the **Show this address list first** drop-down list, and select one of the items under Outlook Address Book. Typically,

there is only one item in this list, called Contacts. In that case, select Contacts.



4 Click **OK**, and then close the dialog box in Outlook.

Create Address Book Entries from Microsoft Outlook

You must have the Address Book Insert access right to be able to create Maximizer Address Book entries from Outlook.

When you have Outlook integration installed and configured, you can create Maximizer Address Book entries from Outlook contacts or email messages, even if Maximizer is not open.

If you are also using Outlook Synchronization for Address Book entries, as described on page 152, Outlook integration adds the newly created Address Book entries to the synchronized Favorite List in Maximizer and category in Outlook, so they will get synchronized in the future.

Set Preferences for Creating Entries

When you create an entry, by default a Save Contact to Maximizer dialog box opens in which you can view and edit the information that will be used to create the entry.

If you want to always use the Maximizer defaults for creating Address Book entries, you can disable the dialog box as follows:

1 In Maximizer, select **File Preferences** and click the **Other Options** button on the System Defaults tab.

2 Deselect the **Confirm when creating Contact** checkbox.

Another preference you can set on this tab is whether entries are created from Outlook as Company/Contact or as Individual entries. The default setting is Company/Contact. If you want Address Book

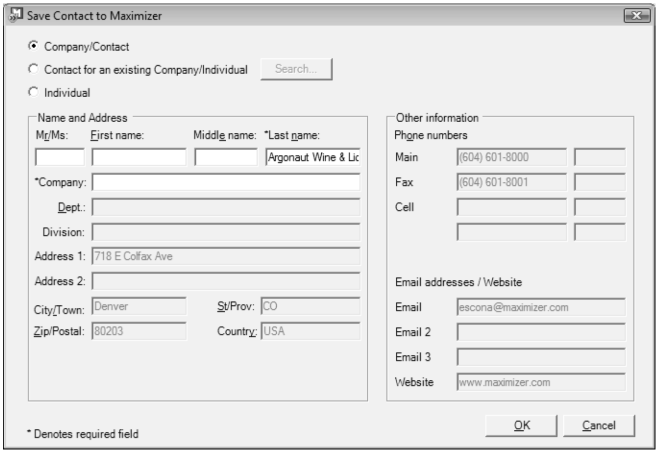
entries to be created by default as Individuals, select Individual from the Default Contact drop-down list.

Create Address Book Entries from Outlook Contacts

Save Contact to Maximizer button in Microsoft Outlook

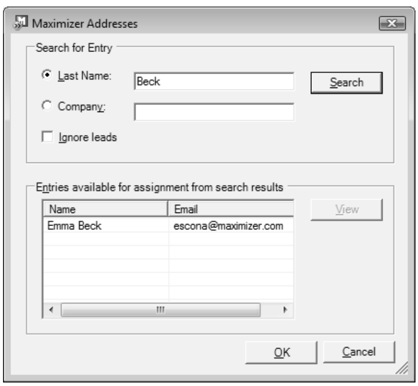
➤ To save an Outlook contact to Maximizer

1. In Outlook, select the contact.
2. Click the **Save Contact to Maximizer** button. The Save Contact to Maximizer dialog box opens.



3. If necessary, change the Address Book entry type.

   If you select the **Contact for an existing Company/Individual** option, click **Search** to find and select the Address Book entry for which you want to create a contact. Click **OK**.



4. Edit the information in the available fields as required.

5 Click **OK** to save the changes.

If you deselected the Confirm when creating Contact checkbox, as described in "Set Preferences for Creating Entries" on page 144, Maximizer creates entries as follows:

- If **Individual** is selected in the **Default Contact Type drop-down** list, Maximizer creates an Individual Address Book entry.
- If **Company/Contact** is selected in the **Default Contact Type** drop-down list, Maximizer creates a Company/Contact Address Book entry. If the Outlook contact information does not include a company name, you are prompted to provide one in the Save Contact to Maximizer dialog box.

Create Maximizer Address Book Entries from Outlook Email Messages

You can also create a Maximizer Address Book entry from an Outlook email message. The entry is created from the email sender (From address).

➤ To save an Outlook email sender to Maximizer

Save Sender As Contact to Maximizer button in Microsoft Outlook

1 In Outlook, select the email message.

2 Click the **Save Sender As Contact to Maximizer** button. The Save Contact to Maximizer dialog box opens.

3 If necessary, change the Address Book entry type.

If you select the **Contact for an existing Company/Individual** option, click **Search** to find and select the Address Book entry for which you want to create a contact.

4 Edit the information in the available fields as required.

5 Click **OK** to save the changes.

If you deselected the Confirm when creating Contact checkbox, as described in "Set Preferences for Creating Entries" on page 144, Maximizer creates Address Book entries as follows:

- If **Individual** is selected in the **Default Contact Type drop-down** list, Maximizer creates an Individual Address Book entry.
- If **Company/Contact** is selected in the **Default Contact Type** drop-down list, you are prompted to supply a Company name in the Save Contact to Maximizer dialog box.

View Maximizer Address Book Entries from Outlook

Use the View Contact in Maximizer button in Outlook to view the related Address Book entry in Maximizer. If Maximizer is not running or a different Address Book is open, clicking this button starts Maximizer and opens the related Address Book.

Clicking this button with an email message selected takes you to the Address Book entry related to the message sender.

Clicking this button with an Outlook contact selected takes you to the Address Book entry related to that contact.

Which Maximizer Address Book entry is associated with the Outlook contact depends on how the association was created:

- If you are using Outlook Synchronization, and the Outlook contact is synchronized with Maximizer, the View Contact in Maximizer button takes you to the synchronized Address Book entry.
- If the Maximizer Address Book entry was created from Outlook using the Save Sender as Contact in Maximizer button, the View Contact in Maximizer button takes you to the Maximizer Address Book entry that was created previously.
- Otherwise, Outlook Integration uses email addresses to associate Outlook contacts with Maximizer Address Book entries, so if more than one Maximizer Address Book entry has the same email address as the selected contact, all matching Address Book entries are highlighted in Maximizer. It matches based on Email 1, 2, or 3 in the Maximizer Address Book entry.

➤ To view a Maximizer Address Book entry from Outlook

1. In a mail or contacts window in Outlook, select an email message or contact.

View Contact in Maximizer button in Microsoft Outlook

2. Click the **View Contact in Maximizer** button.

   The Address Book window in Maximizer opens. The related entry is highlighted in the list.

Use Outlook to Send Email to Address Book Entries

You can use Outlook to send an email message to a Maximizer Address Book entry, even if that Address Book entry does not have a related contact record in Outlook.

Please note that this method may not be available if you are using Word as your email editor. To determine if Word is your email editor, select Tools > Options from the menu in Outlook, and click the Mail

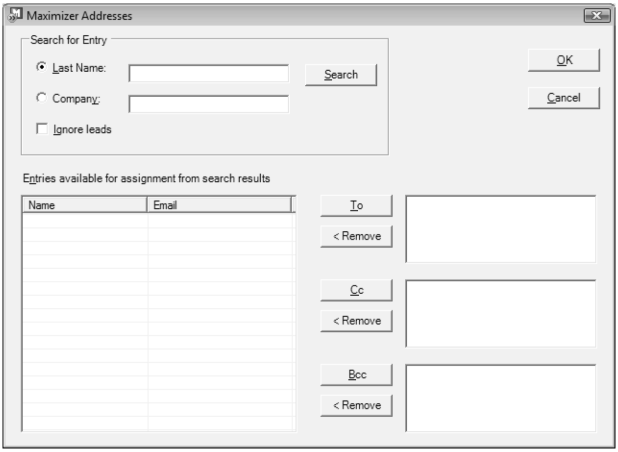
Format tab. If the "Use Microsoft Office Word to edit e-mail messages" checkbox is selected, the Maximizer Addresses button may not be available in the new email message dialog box.

➤ To use Outlook to send an email message to a Maximizer Address Book entry

Maximizer Addresses button in new Outlook email message

1. In Outlook, open a new email message.
2. Click the **Maximizer Addresses** button.

   The Maximizer Addresses dialog box opens.



3. Select **Last Name** or **Company** and enter the full or partial last name or company name to search for.
4. Click **Search**.

   The names and primary email addresses of the matching Address Book entries appear in the "Entries available for assignment from search results" list.
5. Select the Address Book entry from the list, and click the **To**, **Cc**, or **Bcc** button.

   You can select multiple entries by holding down the Ctrl key or Shift key.
6. Repeat these steps to add any additional Address Book entries, as needed.
7. Click **OK**.

   The Maximizer Addresses dialog box closes, and the selected email addresses appear in the new mail message dialog box.

Save Outlook Email Messages as Documents in Maximizer

When Outlook integration is installed and configured, you can save Outlook email messages to Maximizer Address Book entries, even if Maximizer is not open. You can save email messages you have already received, or you can save email messages when you send them.

If there are no Address Book entries associated with the email message, you either create an entry yourself or let Maximizer create it for you, depending on your preference settings. The email message is then saved to this entry's documents. If the email address does not have a record in Outlook contacts, Maximizer creates a corresponding Outlook contact.

If you are using Outlook Synchronization for Address Book entries, as described on page 152, Outlook integration also adds the newly created Address Book entries to the synchronized Favorite List in Maximizer and category in Outlook, so they will get synchronized in the future.

Set Preferences for Saving Email

When you save an email message to Maximizer as a document, by default a Save Email to Maximizer Addresses dialog box opens in which you can view and adjust the entries to which the message will be saved.

If you want to use the Maximizer defaults for creating Address Book entries, you can disable the dialog box as follows:

1. In Maximizer, select **File > Preferences** and click the **Other Options** button on the System Defaults tab.
2. Deselect the **Confirm when saving email** checkbox.

Save Email to Maximizer Address Book Entries

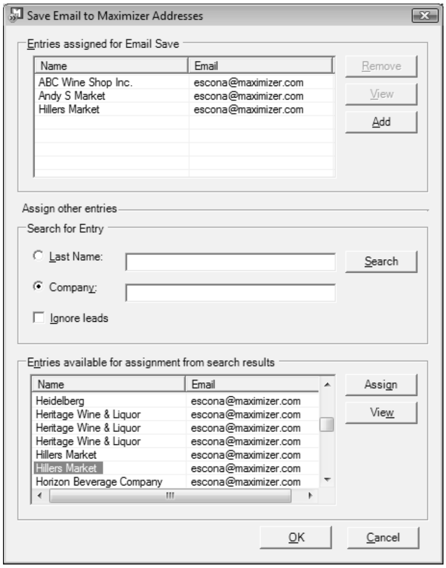
You can save an email message you received in Outlook to the Documents window of one or more Address Book entries in Maximizer.

➤ To save an email message to Address Book entries in Maximizer

Save Email to Contact in Maximizer button

1. In Outlook, select the email message to save.
2. Click the **Save Email to Contact in Maximizer** button.

The Save Email to Maximizer Addresses dialog box opens. Any Address Book entries associated with the sender's email address are displayed in the **Entries assigned for Email Save** list. If no such entries exist, this list is empty.



3. If necessary, click **Add** to create an Address Book entry to save the email message to. The Save Contact to Maximizer dialog box opens. Enter and edit information as required and click **OK**.

Click View to view an entry in Maximizer.

4. To remove an entry from the **Entries assigned for Email Save** list, select the entry and click **Remove**.

5. To save the email message to other Address Book entries:
   - Search for the entries by **Company** or **Last Name** and click **Search**.
   - Select the entries from the **Entries available for assignment from search results** list and click **Assign**. The entries are moved to the Entries assigned for Email Save list.

6. Click **OK**.

   The email message is saved as a document to the assigned entries.

If you deselected the **Confirm when saving email** checkbox in the Other Systems dialog box, Maximizer saves the document only to the Address Book entries that contain the sender's email address.

Send Email Messages and Save them to Maximizer Address Book Entries

You can save an email message you send from Outlook to the Documents window of one or more Address Book entries in Maximizer.

Send Email and Save to Contact in Maximizer button

➤ To send an email message and save it to an Address Book entry in Maximizer

1. Open the Compose dialog box in Outlook.
2. Compose the email message.
3. Click the **Send Email and Save to Contact in Maximizer** button.

ⓘ See the previous section for details on how to work with the Save Email to Maximizer Addresses dialog box.

If the Confirm when saving email checkbox is selected, as described on page 149, you can adjust the entries the email will be saved to in the Save Email to Maximizer Addresses dialog box. If no Address Book entries are associated with a recipient's email address, you may need to create one.

If you disabled the Confirm when saving email option, the Maximizer defaults for saving email will be used.

Create Customer Service Cases from Outlook

You can create customer service cases from email messages within Outlook.

Create CS Case button in Microsoft Outlook

➤ To create a customer service case from Outlook

1. In Outlook, select the **Create CS Case** button.
2. In the **Maximizer Customer Service Case** dialog box, select the appropriate option.
3. If you are creating a new contact at the same time as the customer service case, enter the information for the new contact in the **Save Contact to Maximizer** dialog box. See "Create Address Book Entries from Outlook Contacts" on page 145 for details.
4. If necessary, select the Address Book entry in the **Save Email to Maximizer Addresses** dialog box. If there is an associated Address Book entry for the selected email message, it is displayed in the **Entries assigned for Case Creation** list. If necessary, search for entries and assign them to the case.
5. In the **Case for [Address Book entry]** dialog box, specify the most important information about the case.

Synchronizing Address Book Entries with Microsoft Outlook

Outlook Synchronization works with Microsoft Outlook only, not Microsoft Outlook Express.

Outlook Synchronization mirrors select appointments, tasks, and Address Book entries between Maximizer and Microsoft Outlook to ensure the entries exist in both programs and that they both contain the same information.

Outlook Synchronization settings are configured on a per-user basis, and each Maximizer user has one set of configuration settings.

Outlook Synchronization preferences enable you to select which entries will be synchronized:

- For appointments and tasks, only entries scheduled within the specified date ranges will synchronize, with the exception of recurring appointments and tasks, as described in the following section. These settings apply to appointments and tasks in both Maximizer and Outlook.
- For Maximizer Address Book entries, only the entries belonging to the selected Favorite List will synchronize with Outlook. Those entries will be assigned to the specified Outlook category.
- For Outlook contacts, only the contacts assigned to the specified category will synchronize with Maximizer. Those entries will be assigned to the selected Favorite List in Maximizer.
- Products/Services and Categories are synchronized to Outlook. Attendees, resources, and any notes you add to an appointment are also synchronized. These items appear as part of the appointment dialog box in Outlook.

Outlook Synchronization preferences also enable you to specify how often to synchronize and how to handle conflicts when the same entry has been modified in both Outlook and Maximizer.

Appointment and Task Synchronization

When Outlook Synchronization is configured, it can synchronize select appointments and tasks between the Maximizer Address Book and Microsoft Outlook. Only those appointments and tasks scheduled within the specified date ranges will synchronize, with the following exceptions:

- If an instance of a recurring appointment occurs within the specified date range, all instances of the recurring appointment will be synchronized.
- If a task is scheduled prior to the specified date range, but the "Carry forward unfinished tasks" option is selected, the task will be synchronized.

You can also specify whether to synchronize private appointments and/or tasks.

Recurring Appointments

Recurring appointments in Microsoft Outlook synchronize to Maximizer as recurring appointments unless they have no end date. If the recurring appointment has no end date, only the first occurrence synchronizes with Maximizer, not the recurrences. To synchronize recurring appointments with Maximizer, always provide an end date.

Note that while it is possible to modify the Private property of a single instance of a private appointment in Maximizer, this property can be changed only for the entire series of recurring appointments in Outlook. Therefore, if you change the Private property of a single instance of a recurring appointment in Maximizer, this change will not be synchronized to Outlook.

Recurring Tasks

If you synchronize a recurring task from Outlook, and then mark the task as complete in Maximizer, Maximizer cannot create the next instance of the recurring task. You should mark the task as complete in Outlook, which will create the next instance of the task, and then re-synchronize with Maximizer.

If you synchronize a recurring task from Outlook, and then delete the task in Maximizer, all instances of the recurring tasks are deleted. If you want to delete a single instance of a recurring task, you should delete the task in Outlook and then re-synchronize with Maximizer.

Group Appointments

When using Outlook Synchronization, group appointments in Maximizer synchronize to Outlook for the current user only. However, the synchronized appointment in Outlook includes all the locations, resources, and attendees information in the appointment notes. To fully synchronize group appointments between Maximizer and Outlook, use MaxSync for Microsoft Exchange.

Microsoft Outlook Synchronization and MaxSync for Microsoft Exchange

If MaxSync for Microsoft Exchange is installed and configured for the current Address Book, Outlook Synchronization no longer synchronizes appointments or tasks. However, Outlook Synchronization still handles Address Book entry synchronization. If MaxSync for Microsoft Exchange is active, the appointment and task synchronization sections of the Outlook Synchronization configuration properties are disabled.

Refer to the *Maximizer CRM Administrator's Guide* or Administrator Help for more information about MaxSync for Microsoft Exchange.

Microsoft Outlook Synchronization and MaxExchange Synchronization

In a MaxExchange environment with Microsoft Outlook Synchronization enabled, Maximizer can synchronize with Outlook on a single server or remote only. Otherwise, duplication of entries may occur.

When MaxExchange is installed, and at least one MaxExchange remote has been added as a distribution site, a MaxExchange Location button appears at the bottom of the Outlook Synchronization tab. Clicking this button opens a dialog box containing a drop-down list of MaxExchange servers and remotes for the current Address Book. Select the MaxExchange server or remote where Maximizer will synchronize entries with an Outlook profile for the selected user.

Synchronization from Outlook to Your PDA

In addition to synchronizing Maximizer data with Outlook, you can synchronize information from Outlook to your PDA. There are several selections of available software to perform this synchronization. Please consult with your PDA manufacturer or supplier for more information.

Prepare Your Outlook Address Book

Each Outlook contact that you want to synchronize, must be assigned to a category. Contacts are then synchronized with Maximizer.

➤ To assign a category to an Outlook contact

1. In Outlook, open the Address Book list you selected in the procedure described on page 143. (For example, if you selected the Contacts address list, open **Contacts**, as shown here.)
2. From the **Edit** menu, select **Select All**.
3. From the **Edit** menu, select **Categories**.
4. Click the **Master Category List** and add a new category called **Maximizer**.
5. In the **Available categories** list, select the checkbox beside the **Maximizer** category and click **OK**.

All selected Outlook contacts are now assigned to the Maximizer category.

Prepare Your Maximizer Address Book

In Maximizer, you must create a Favorite List that specifies which Address Book entries are to be synchronized with Outlook.

➤ To prepare your Maximizer Address Book

1. In Maximizer, select **Favorite Lists** from the **View** menu.
2. Click **Add**.
3. Enter a **name** for your Outlook synchronization Favorite List and click **OK**.
4. Close the Favorite List dialog box.

Configure Outlook Synchronization

For detailed information about Outlook Synchronization preferences, click inside the dialog box, and press F1.

➤ To configure Outlook Synchronization

1. Select **File** > **Preferences**.
2. Click the **Outlook Synchronization** tab.
3. In the **Synchronization frequency** group box, specify how often Maximizer should synchronize with Outlook.

   If you select **Never (manual synchronization)**, the user must synchronize manually by clicking the Synchronize with Outlook toolbar button or selecting **Tools** > **Synchronize with Outlook** from the menu bar in Maximizer.
4. In the **Conflict resolution** group box, select the desired method of handling entries that have been changed in both Maximizer and Outlook since the last synchronization.
5. In the **Outlook profile** field, enter the name of the user's Outlook profile. This information must be obtained from the user's computer.

   Do not select Ignore computer name if you use multiple computers and synchronize to a different Outlook profile on each computer.

   To ignore the computer name when synchronizing, select the **Ignore computer name** checkbox.
6. To synchronize appointments, select the **Synchronize appointments** checkbox and specify the date range of appointments to synchronize.

   Private appointments will not be synchronized unless the **Include private appointments** checkbox is also selected.

7. To synchronize tasks, select the **Synchronize tasks** checkbox and specify the date range of tasks to synchronize.

   Private tasks will not be synchronized unless the **Include private tasks** checkbox is also selected.

   To also synchronize incomplete tasks that are scheduled prior to the specified date range, select the **Carry forward unfinished tasks** checkbox.

8. To synchronize Maximizer Address Book entries and Outlook contacts, select the **Synchronize Address Book entries** checkbox.

9. To specify the mapping between Outlook and Maximizer phone number fields, click the **Phone Mapping** button, and select the Maximizer phone number field to map to each Outlook phone number field. If necessary, use the **Move Up** and **Move Down** buttons to prioritize the fields in the phone mapping list. Click **OK**.

   Maximizer supports only four phone numbers for an Address Book entry, so when you synchronize from Outlook to Maximizer, only four Outlook phone numbers are synchronized. For information on the process that determines which phone numbers are synchronized, see "How Phone Numbers are Synchronized from Outlook" on page 157.

10. In the **Synchronize Address Book entries from Favorite List** drop-down list, select the Maximizer Favorite List to synchronize.

11. In the **Synchronize Contacts from Outlook Category** drop-down list, select the Outlook category to synchronize.

12. If you are a MaxExchange user, click the **MaxExchange Location** button, select the MaxExchange server or remote where your Outlook profile can synchronize with Maximizer, and click **OK**.

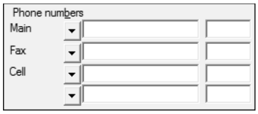
13. Click **OK**.

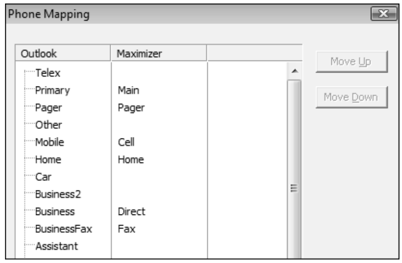
How Phone Numbers are Synchronized from Outlook

Only mapped phone numbers are synchronized.

In an Outlook to Maximizer synchronization, Maximizer first tries to synchronize mapped phone numbers whose descriptions exist in the default Address Book entry. Maximizer then tries to synchronize mapped phone numbers that appear highest in the phone mapping list.

In the following examples, the phone number descriptions in the default entry are Main, Fax, and Cell, and the mapped phone numbers are as shown below:

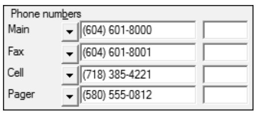




Because the fourth phone number description is empty in the default entry, Maximizer fills it with the Pager phone number description. (Main is higher in the phone mapping list, but it's already been synchronized.)

Example 1

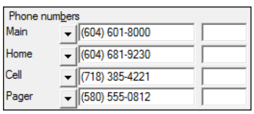
If Outlook values exist for all mapped phone numbers, the following phone numbers would be included in the synchronized entry:



As in the previous example, Maximizer uses Pager for the fourth phone number description. In a later pass, Maximizer determines that there is not an Outlook value for Fax, so it replaces the Fax phone number description with Home (the highest, not yet synchronized phone number in the phone mapping list).

Example 2

If Outlook values exist for all mapped phone numbers except Fax, the following phone numbers would be included in the synchronized entry.



Synchronize Your Maximizer Address Book with Outlook

After you have prepared Maximizer and Outlook for synchronization, the process is simple.

➤ To synchronize your Maximizer Address Book with Outlook

1. Click the **Synchronize with Outlook** button on the Maximizer toolbar.

   Depending on how many Outlook contacts you are synchronizing, the processing time will vary. A message box appears when the synchronization is complete.

2. In Maximizer, open the **Address Book** window.
3. From the **View** menu, select **Favorite** Lists.
4. Select the Favorite List you configured for synchronization with Outlook and click **Retrieve**.

Keeping Records of Your Telephone Calls

With Maximizer, you can quickly dial an Address Book entry, make a series of phone calls, receive calls, and record incoming and outgoing phone call activities in the Phone Log.

Use the Previous and Next buttons in the Phone dialog box to work through the current Address Book entry list.

Users can transfer incoming calls to any other phone extension in the phone company's system. If a note is logged for the phone call transfer (logging must be enabled for phone calls in File > Preferences), the logged note includes the transfer information.

If you are using TAPI, follow these steps to take incoming calls. See "Set Up Automatic Dialing" on page 162 for more information on setting up TAPI.

➤ To phone a Company, Individual, or Contact

You can put a caller on hold by clicking the Hold button. To resume a call, click the Release button.

1. Click the **Phone** button on the toolbar and click **Incoming**.

   – or –

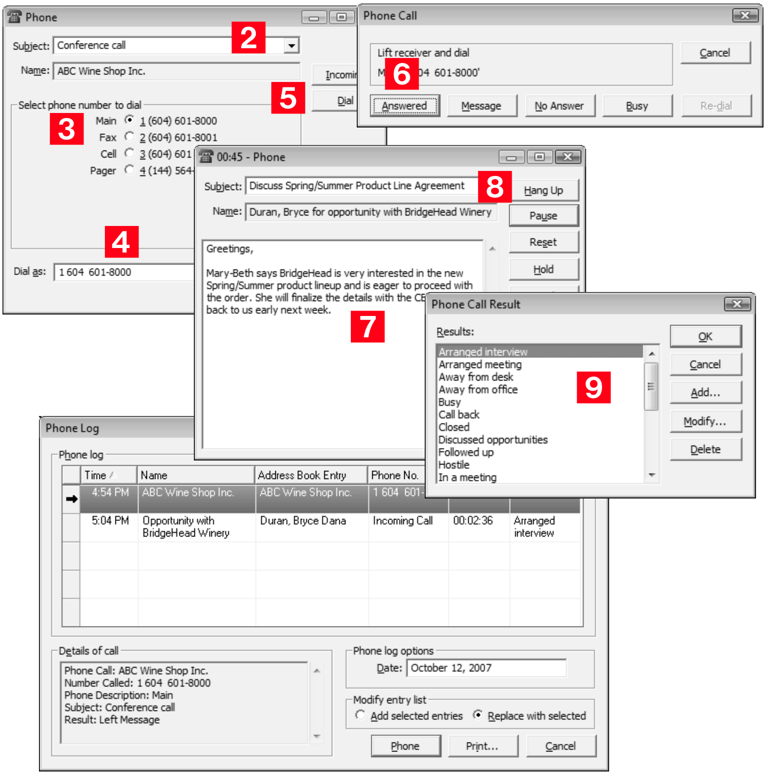
   Right-click on an Address Book entry and select **Phone** > **Make a Call**. Alternatively, you could select **Actions** > **Make a Call**.
2. Select or type a **Subject** for your phone call.
3. Select the number to dial in the **Select a phone number to dial** section of the dialog box.
4. Select a phone number format from the **Dial as** field.

   These formats are set up in Dialing preferences tab (File > Preferences > Dialing tab).
5. Click **Dial**.
6. In the Phone Call dialog box, choose a response. For example, if the call was answered, choose **Answered**.
7. After clicking a response, the Phone dialog box appears. Record notes on your call as you talk.
8. Click **Hang Up** when you are finished, and then click **Close**.

In order for the Phone notes dialog box to appear automatically, logging must be enabled for Phone Calls in preferences (File > Preferences > Logging tab).

To later view the details of calls you made, access the Phone Log from the View menu.

9 Optionally, you can record the result of the outgoing call in the Phone Call Result dialog box. Click **OK** to close the dialog box.



➤ To receive a call

1. Click the **Phone** button on the toolbar and click the **Incoming** button in the Phone dialog box.

   – or –

   Right-click on an Address Book entry and select **Phone** > **Receive a Call**. Alternatively, you could select **Actions** > **Receive a Call**.

2. Select or type a **Subject** for your phone call.
3. Record notes on your call as you talk.
4. Click the **Hang Up** button when you are finished.
5. Optionally, you can record the result of the outgoing call in the Phone Call Result dialog box.

In order for the Phone notes dialog box to appear automatically, logging must be enabled for Phone Calls in preferences (File > Preferences > Logging tab).

➤ To transfer a call

1. When you have an incoming call that you would like to transfer, click the **Transfer** button in the Phone dialog box.
2. Select a user in the **Display name** list or enter a valid extension for your company's phone system. Note that a phone extension does not have to be associated with a user in the current Address Book.
3. Click **OK** to complete the transfer.

Set Up Automatic Dialing

If your modem can dial out in other applications, then you can use your modem in Maximizer.

If you have a modem installed in your computer, you can configure Maximizer to dial the phone for you when you make a phone call using the Phone feature in Maximizer. Before Maximizer can use your modem, you must first make sure that your modem functions correctly with your computer system, then configure your modem using the Preferences dialog box in Maximizer.

Your modem preferences tell Maximizer where your computer's modem is connected and how it performs. Some of these settings are more critical than others. For example, if you set up your port incorrectly, your modem will not work at all; but if you set up your baud rate incorrectly, the modem will operate, but perhaps at a slower speed.

TAPI lets you use your Telephony Application Programming Interface modem to identify and direct signals received by your communications port to the appropriate application.

➤ To configure your modem in Maximizer

1. Select **File** > **Preferences**.
2. In the **Dialing** tab, select **Modem** or **TAPI**.
3. If you selected **TAPI**, click the **Properties** button to configure the dialing properties for the modem, and click the **Device** button to configure the Device properties for the modem.

   – or –

   If you selected **Modem**, fill in the remaining fields.
4. Click **OK**.

For a list of each control and how to fill in the field, press F1 while in the Dialing tab.

Your modem is now ready for use in Maximizer.

For more information on setting up dialing preferences, including documentation on using TAPI, refer to the *Maximizer CRM Administrator's Guide*. The guide can be accessed from the Help menu in Maximizer.

CHAPTER 5

Managing Opportunities

Organize Your Sales with Opportunity Management

In this chapter...

"Managing Your Sales Opportunities" on page 164

"Using Opportunities" on page 165

"Designing Strategies for Your Opportunities" on page 166

"Entering Your Strategies in the Strategy Library" on page 169

"Entering a Default Opportunity" on page 170

"Working with Multi-Currency in Opportunities" on page 171

"Pursuing Sales Opportunities" on page 173

"Scheduling Strategies for Opportunities" on page 176

"Modifying Opportunities with Global Edits" on page 180

"Viewing the Opportunity Pipeline Report" on page 181

Managing Your Sales Opportunities

Opportunity management helps you and your colleagues manage complex sales. Complex sales involve the participation of more than one person in the buying decision and require the support of a sales team. Prospects for complex sales can range from single businesses to multiple corporations or governments.

- Create strategies—detailed plans that identify the factors that influence a sale and the activities you must perform to close the opportunity.
- Apply these strategies to opportunities.
- Effectively schedule and coordinate the selling process among all members of your sales team.
- Ensure that all the right people in your organization have up-to-date information about the status of your opportunities.
- Forecast the probability of successfully closing your opportunities.
- Analyze the effectiveness of your strategies and create new ones for new opportunities.

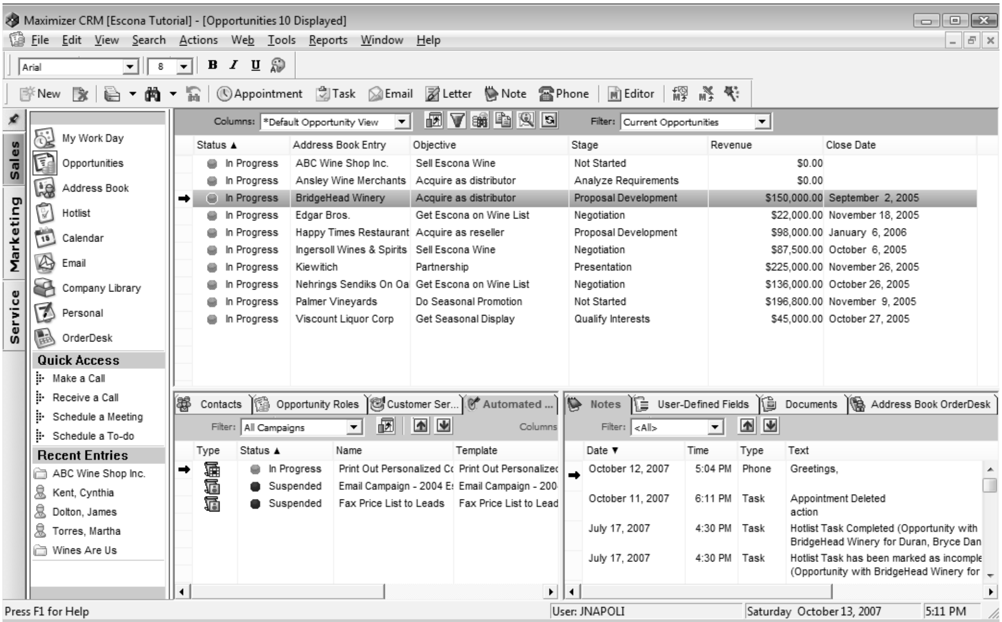
In short, Maximizer helps you define and strengthen your selling methodology. Your sales team can define a strategy—what you need to do to close a sale and how to address the issues and obstacles involved—and then apply this strategy to opportunities.

Using Opportunities

Your system administrator uses the Administrator module to set up sales and marketing teams.

Keep the following points in mind when working with the Opportunities window:

- Use the **view bar** buttons for common opportunity tasks.
- Use the **view filter** to show all opportunities, team-updated opportunities, or current opportunities.
- Double-click an **opportunity** to view or modify it.
- Click the **View in Address Book** button in the View bar or choose the option from the shortcut menu to view the Address Book entries associated with a single opportunity or multiple opportunities.
- View additional information for the selected opportunity in the **following windows**.
- View **notes** that Maximizer automatically creates to record opportunity activity.



Designing Strategies for Your Opportunities

The Maximizer Training Guide offers step-by-step exercises that help you learn how to make your own strategies and use them in opportunities.

Before you can enter your organization's sales strategies, you need to gather information from your sales people. The best strategies combine the knowledge and experience of everyone in your organization; therefore, you should involve as many people in this process as possible. The result will be a pattern of success that you can follow like a road map.

Be thorough when gathering information for strategies—the more accurate your strategies, the more success you will have in pursuing opportunities and winning sales. Think through the way you do business now, how you want to improve your processes, and what you want your strategies to accomplish.

An opportunity does not always need to have an assigned strategy.

After you have gathered your organization's strategy information, you can enter this information into the Strategy Library. You can enter an unlimited number of strategies, and you can use the elements of one strategy to build other strategies. A strategy's primary components are:

- A game plan—the "steps"
- The actions that form the smallest building blocks of each step—the "activities"
- The key people who determine the success of the opportunity—the "roles"
- The factors that influence the success of an opportunity—the "success factors"

Steps

A step is a milestone in the strategy that reflects actions that must be taken when pursuing the opportunity. Each step represents one or more activities that must be accomplished before the step is considered complete.

Activities

An activity is an action that forms the smallest building block in the strategy. As your organization works through an opportunity, activities are sent to the team members. An activity contains a description of the action, an estimate of the time it will take, and an estimate of its cost.

Roles

A strategy probably will be applied to many different opportunities, so you may not know the names of the people who will directly influence the outcome of an opportunity. You should, however, identify the key roles that will be assumed by key people. You will then assign each role a weight in the same way that you assign weights to the strategy's success factors.

Success Factors

Factors such as cost, features, and customer needs will influence the sale of your product or service. When you develop a strategy, choose success factors that you believe will play a large part in determining the successful outcome of an opportunity. Then assign each success factor a weight based on your assessment of how much it will influence the outcome of the opportunity.

By carefully working through the planning process, you define the strategies that work in your organization. Once you create a strategy in the Strategy Library, you can apply the strategy's particular sales plan to any new opportunity that you create in Maximizer.

Break Steps into Activities

Some steps may be so simple that there is no need to break them down further. In most cases, however, you will find it easier to develop a strategy that works if you first define the major steps and then break down each step into a series of activities that you can schedule and assign to team members.

For instance, for Escona you may use something like the following:

Steps	**Activities**
Arrange tour and preliminary meeting	Send price list and Escona information Call distributor to arrange meeting and tour
Write and present agreement	Finalize reseller agreement Create final draft of agreement Present agreement to distributor
Close deal and sign agreement	Coordinate signing of agreement Fill out product order Arrange partnership dinner

Each activity is assigned to a single user or sent to a team member. When the team members mark an activity as completed, Maximizer updates the status of the opportunity accordingly.

The Strategy Library requires you to define activities separately from steps. This allows you to use an activity in several different steps. When you assign activities to a step, you simply select from a list of available activities.

Define the Strategy Roles

The next step in developing your strategy is to determine the key roles—positions assumed by key people that will directly influence the outcome of an opportunity that is assigned to this strategy.

When you are defining a strategy, you don't necessarily know who will fill these roles for each opportunity. If you can define generic roles for your strategies—for instance, the CEO and Purchasing Agent—you can later use people's names for those generic roles for individual opportunities.

Define Strategy Success Factors

Strategies include influences called success factors. Choose success factors with care—they are used to estimate the probability of a successful outcome of an opportunity. Success factors should be defined based on the experience of your sales people. After choosing a success factor, you also assign a weight to the success factor based on your assessment of importance. Success factor definitions let Maximizer tell you how the opportunity is progressing and how you can improve your probability of success. Once you have defined a success factor, you can use it in any number of different strategies.

Maximizer includes two success factors:

- **Political Alignment** – This success factor measures the impact of the key people who can influence the outcome of an opportunity.
- **On Schedule** – Maximizer uses this success factor to determine whether an opportunity is ahead or behind schedule.

Success Factors are defined in Administrator. These two factors, along with the others that you define, must be weighted according to their importance in pursuing the opportunity. You can't delete the predetermined success factors—if these success factors have no significance, assign the success factors a weight of zero, or don't assign them to the strategy.

Entering Your Strategies in the Strategy Library

For more detailed instruction, open Maximizer Help and look up "Strategy Library". Or, click the Wizard button on your Standard toolbar and run the Add Strategy wizard.

Once you have your strategy planned on paper, entering it into Maximizer is easy. The Strategy Library is a tabbed dialog box in which you can create a library of roles, success factors, activities, and steps. You use these elements when you add a new strategy to the library.

➤ To define a strategy

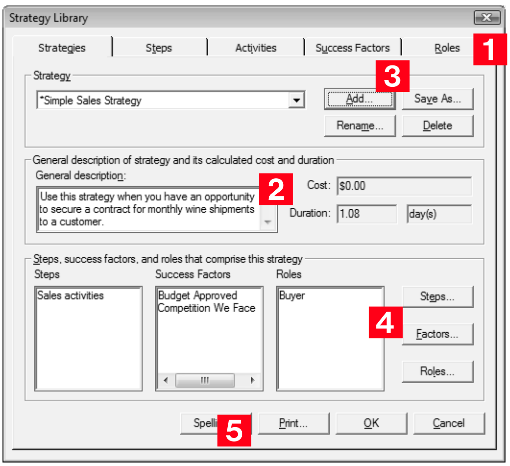
1 Each tab lets you construct a different strategy element. Start with the **Roles** tab and finish with the **Steps** tab before you construct your strategy in the Strategies tab. These elements are then selected and assembled into your new strategy.

2 **Cost** and **duration** are automatically calculated from the cost and effort of the component activities.

3 Use these buttons to add, **copy** (Save As), **rename**, or **delete** strategies.

4 When you are ready to put together the strategy, click a button to begin adding **steps**, **factors**, and **roles** to your new strategy.

5 Click **Print** to print the selected strategy.



6 After you have designed a strategy, you can apply it to any new opportunity you create.

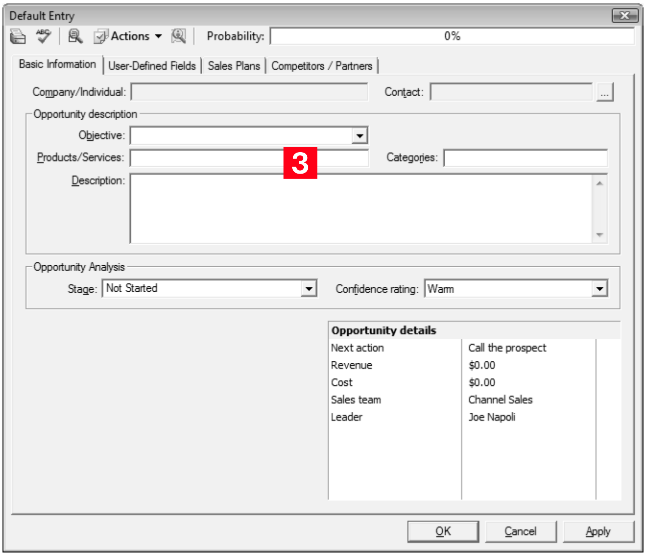
Entering a Default Opportunity

If you frequently assign or enter the same opportunity values and want to save time by having those values pre-entered each time you create an opportunity, you can define default field values in the Default Entry for opportunities.

➤ To define defaults for opportunities

Default entries are user-specific so each user in the Address Book can have different default entries.

1. Open the **Opportunities** window.
2. Select **Edit** > **Default Entry**.
3. Enter the default values for any fields that you want to have pre-defined values when an opportunity is created.



4. Click **OK** to save the Default Entry.

Working with Multi-Currency in Opportunities

Multi-currency is enabled in Administrator. If this functionality is not enabled, all related fields, menu items, and dialog boxes are not visible in the Address Book. Once multi-currency is enabled for an Address Book, it cannot be disabled. The corporate, or default, currency for the Address Book is also set in Administrator. For more information on enabling multi-currency, granting users rights to manage multi-currency, and setting the corporate currency, see the *Maximizer CRM Administrator's Guide* and Administrator Help.

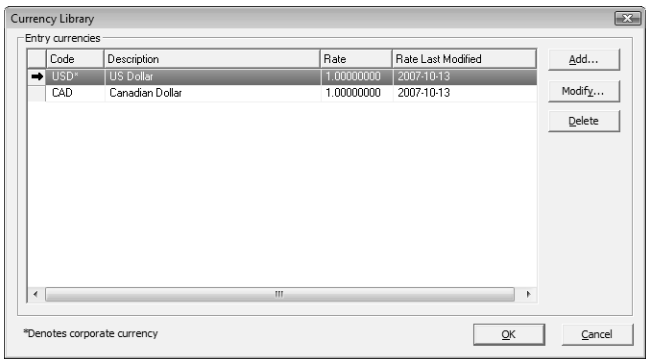
Enabling multi-currency in an Address Book enables users to enter opportunity revenue in other currencies. All other currency fields are displayed in the default currency for the Address Book, otherwise known as the corporate currency. Additional currencies added to the Address Book are known as entry currencies and can be applied to opportunity revenue on a per-entry basis.

The corporate currency acts as the exchange rate baseline for other currencies. The corporate currency always has an exchange rate of 1.0, and entry currencies have their own exchange rates. The exchange rates determine the revenue conversion from one currency to another. By default, the corporate currency is US, but this can be changed in Administrator.

When designated users are given the "Allow manage currencies" security right in their user access rights, they can add, modify, and delete currencies in the Address Book. Currencies are managed in the Currency Library in Maximizer (File > Libraries > Currency Library).

➤ To add entry currencies

1. In Maximizer, select **File > Libraries > Currency Library**.

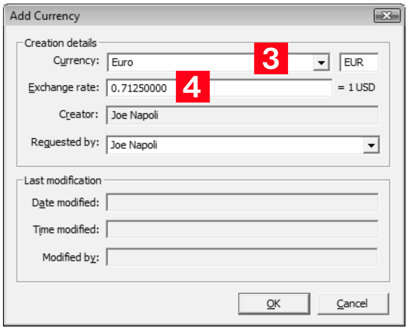


2. Click **Add**.

3. Select a currency from the **Currency** drop-down list. The ISO code is entered automatically, but you can change this field or leave it blank if necessary. For example, you may want to use US, rather than USD, for the US Dollar.

If you change your corporate currency, all currency rates are set to 1.

4 Enter the currency **Exchange rate**. This is the value of the currency in comparison with the corporate currency. By default this is set to 1.



5 If necessary, select a user from the **Requested by** field.

Your entry currency is now added. You can use this currency as the revenue currency for any opportunity entry. Note that the cost fields are displayed in corporate currency.

When you modify an exchange rate for a currency, the new rate is applied to only new opportunities.

To modify or delete a currency, select the currency and click the corresponding button.

To adjust the format of how your currency symbols and ISO codes are displayed in currency fields, go to the Start > Settings > Control Panel > Regional Options > Currency tab. Changes applied are applied to Maximizer currency fields immediately.

Pursuing Sales Opportunities

You can record opportunities without a strategy, if you wish. Specify “Not using a strategy” in the opportunity’s Sales Plan tab.

If you have planned and entered your strategy correctly, it’s easy to implement an opportunity using any strategy in your Strategy Library. You enter new opportunities by selecting an Address Book entry in the Address Book window and adding the new opportunity in the Opportunities window. All opportunities have an associated Address Book entry.

➤ To add an opportunity

1. Select the Address Book entry to which you want to add an opportunity.

You can view associated Contact details while an opportunity is selected in the Contacts following window.

2. Drag and drop the Address Book entry or Contact to the **Opportunities** icon.

   – or –

   Select **Add Opportunity** from the **Edit** menu.

   – or –

   Click **Insert**.

   A new opportunity dialog box opens.

3. Enter the opportunity **Objective**. The objective should describe the goal of this opportunity.

For information on selecting products/services and categories, see Maximizer Help.

4. Select the applicable **Products/Services** and **Categories**.
5. Enter the **Description** of the opportunity.

If you have opportunity data you are upgrading from a previous version of Maximizer, ratings are transferred to the Stage field.

6. Select the **Stage** of the opportunity.

   For example, if you feel confident the opportunity is a good investment of your time, you may select a value such as “Initiate Contact”. The stage coincides with the Probability bar. Note that stages are set up in Administrator in the Opportunity preferences tab. If you are using a strategy, this rating is updated automatically based on the completed success factors in the strategy (steps and activities). If you are not using a strategy, this field is set manually by selecting a stage.

   You can also enter the **Confidence rating**. This field is similar to the Stage field, however, it is not linked to the probability of close and is set based on the sales representative’s feeling about the opportunity.

Mandatory opportunity fields are denoted by an asterisk.

7 Select a **Key Fields** list and then select the appropriate **Key Fields** for the opportunity.

Key Fields are important user-defined fields specific to opportunities and are defined by your administrator in the Administrator's Key Fields preferences tab. An unlimited number of Key Fields lists can be set up using up to eight opportunity user-defined fields for each list.

If multi-currency is enabled for your Address Book and currencies other than the default currency have been set up, you can select a specific currency for the opportunity revenue field. For more information, see "Working with Multi-Currency in Opportunities" on page 171.

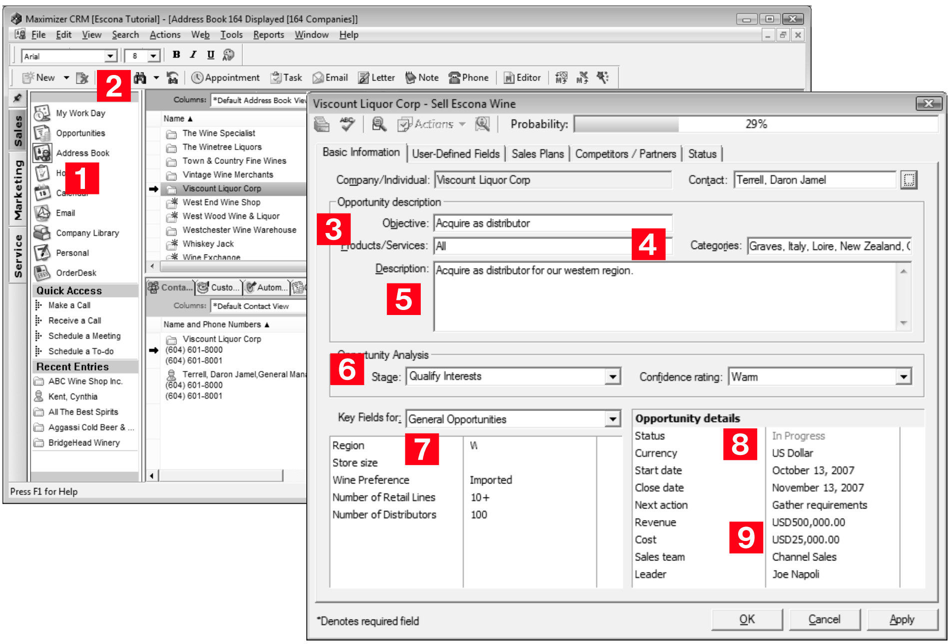
8 Enter the opportunity's details such as the **Currency** and **Revenue** (potential revenue). You can change this amount later, if necessary.

9 Choose the team (or user) that should work on this opportunity. You can make modifications to the team members for each opportunity.

10 You can perform common tasks by clicking the **Actions** button from any of the opportunity dialog box tabs.

When an Address Book entry has a partner assigned to it, the partner is automatically assigned to any opportunity created for the Address Book entry.

11 Work through the remaining tabs, entering the opportunity's details including the user-defined fields, strategy, competitors, partners, and status.



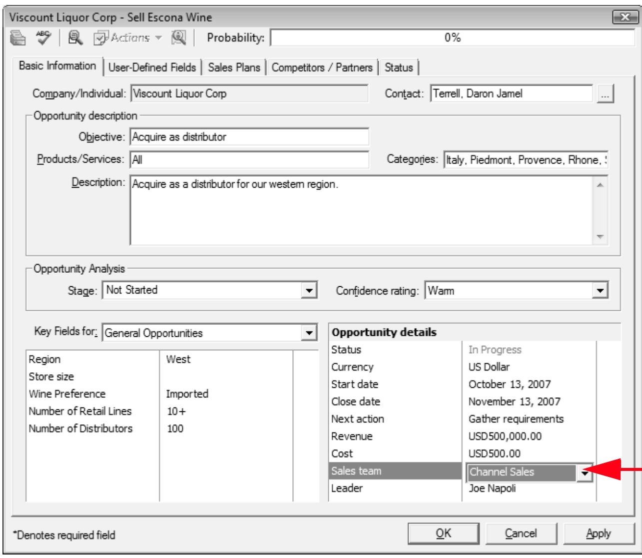
Make it a Team Effort

Maximizer offers you the ability to assign an opportunity to any sales team your system administrator has set up in Administrator. Teams allow you to delegate individual activities of the opportunity to members of the team. These activities appear in the team member's Hotlist for completion by the scheduled time.

Sales Team Members

Sales teams are set up in Administrator. For more details, see the *Maximizer CRM Administrator's Guide* or Administrator Help.

- **Team Leader** – In a team, one person is designated as a team leader who has the right to make changes to the opportunity as well as the opportunity's team.
- **Team Member** – A regular team member does not have the right to change the opportunity nor the team. The member's role is to perform the tasks the team leader assigns.
- **Team Member with Edit Rights** – In Maximizer, the team leader can grant any member the right to edit the opportunity, which essentially gives the same abilities of the team leader. This right must be granted on a per-opportunity basis, unless your system administrator specifies otherwise.



Choose a team from the Sales team drop-down list.

Scheduling Strategies for Opportunities

Once you have defined your strategies in the Strategy Library, you can schedule a strategy for an opportunity. This will ensure you keep up to date with all of the roles, success factors, and steps that influence an opportunity's success.

Note that if you change the scheduled strategy for an opportunity, all incomplete activities for the initial strategy are removed from the opportunity. Complete activities remain as part of the Sales Plan. After a different strategy is scheduled for an opportunity, the activities associated with that strategy are applied to the Sales Plan. If you had standings associated with roles in the previously scheduled strategy, the standings are carried over to the newly scheduled strategy.

➤ To schedule a strategy for an opportunity

1. Open the opportunity and click the **Sales Plan** tab.

   The **Show strategy** option should be selected by default.

2. Select a strategy from the **Strategy template** drop-down list.

   You can click the **Details** button to view specific properties of the strategy such as the description and cost.

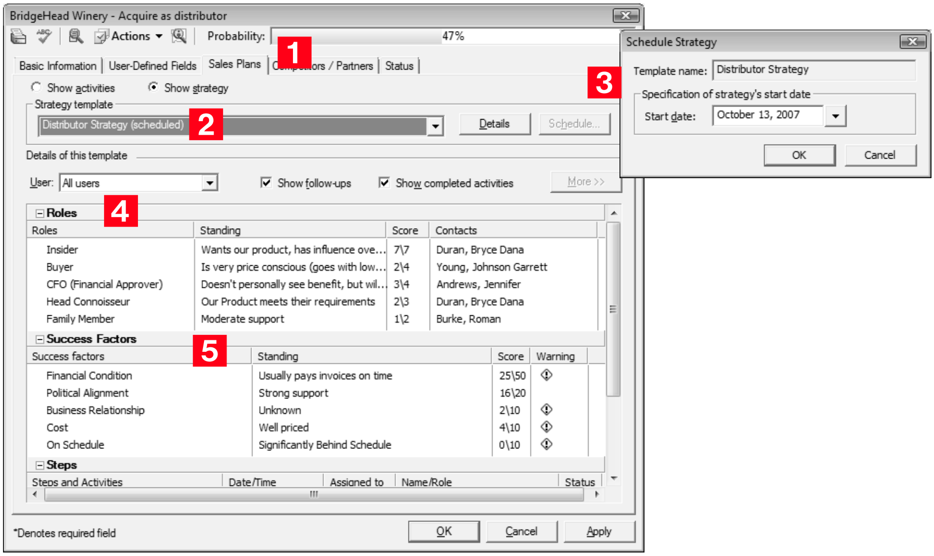
3. Click the **Schedule** button and specify the **Start date** for applying the strategy. Click **OK** to return to the Strategy tab. Once a strategy has been scheduled, the Strategy template name and the Schedule button are inaccessible (grayed out).

4. Select a **role** and click in the **Standing** column to choose a standing for the role. You can also select a **Contact** for the role if necessary by clicking inside the **Contact** column when a role is selected.

5. Select a **success factor** and click in the **Standing** column to choose a standing for this success factor. Note that the "On

For detailed information on how roles, success factors, and steps determine the probability of closing an opportunity in relation to their weighted scores and standings, see "Designing Strategies for Your Opportunities" on page 166.

Schedule” and “Political Alignment” success factors are calculated automatically.



6 Select a **step** and click the **plus sign** to view all activities for this step.

You can use the **More** button to add, modify, or delete roles, success factors, steps, and activities or you can use the shortcut menu.

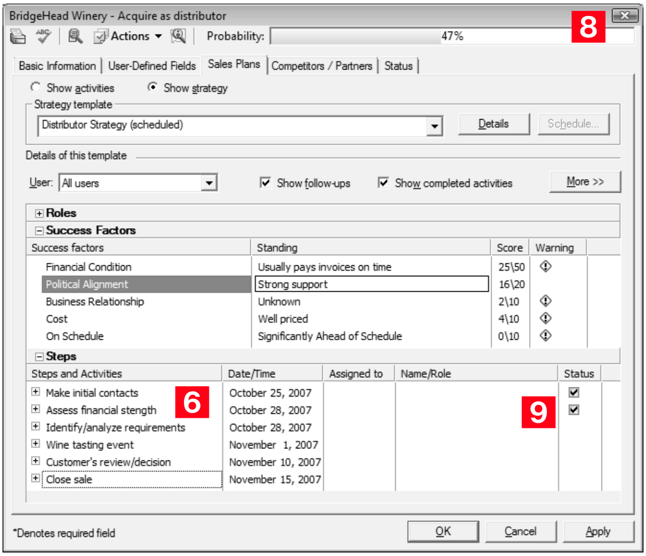
7 If you have a team assigned to an opportunity, you can delegate team members to specific activities in a step. Double-click on an **activity** and choose a **user** from the **Team member responsible for completion** drop-down list.

8 Update the strategy application as **roles** become more influential, **success factors** change, and **steps** are completed. The **progress indicator** will change automatically in alignment with the success of the opportunity.

9 To mark an activity as complete, click inside the **box** displayed after the activity. Overdue activities are denoted by a warning symbol after the activity.

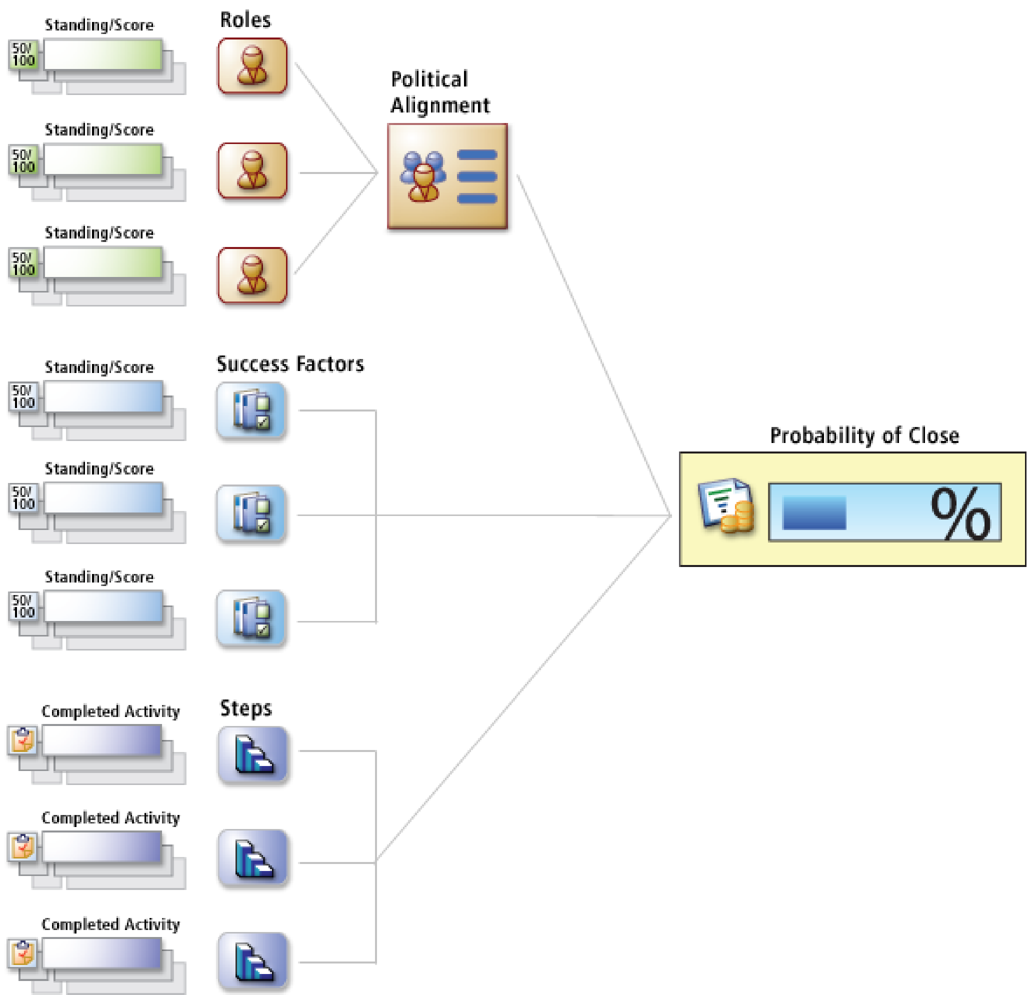
Use the **Show follow-ups** option to display follow-up activities related to an activity within a step. Use the **Show completed**

activities option to display completed activities. (Otherwise, completed activities are removed from the step.)



Progress Indicator

The progress indicator for the probability of close is updated based on the weighted sum of the standing/score of the roles and success factors, as well as the number of completed activities within a step. See the following illustration:



Modifying Opportunities with Global Edits

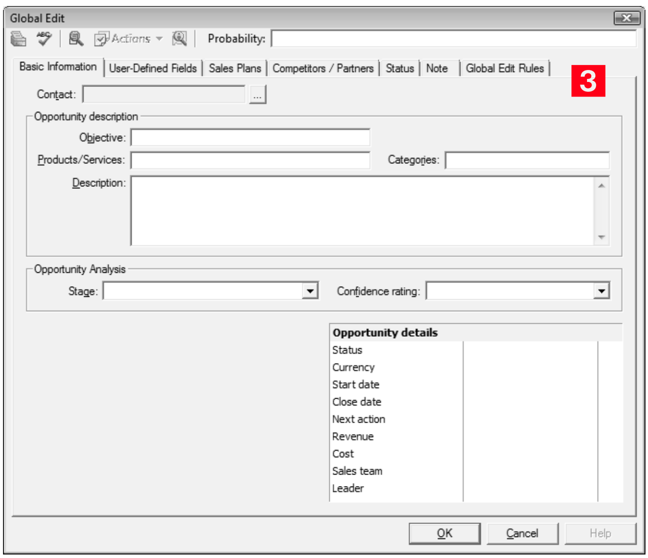
You can update a number of opportunities at the same time with the Global Edit command. For example, you may want to change the start date of several opportunities. This is a very powerful feature, so you might consider making a backup of your Address Book before making significant changes using Global Edit.

➤ To perform a global edit

1. In the Opportunities window, select the **entries** you want to modify.
2. Select **Global Edit** from the **Edit** menu. The Global Edit dialog box appears.
3. Apply your edits to the various different opportunity tabs. Changes made to these tabs are applied in the same way as when you are entering a new opportunity although not all fields and buttons are available. The changes are applied to all opportunities included in the global edit. If you don't select any opportunities, the edits are applied to all your opportunities in the current list.

For more detailed information, see F1 Help and Maximizer Help.

You can also select **Remove** for many of the fields in the Basic Information tab. This option lets you remove existing values for a field without specifying alternative values.



4. Click **OK** to apply the global edits.

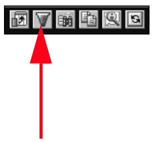
Viewing the Opportunity Pipeline Report

With a single click, you can view the current opportunities in the pipeline. The Opportunity Pipeline Report can also be modified—it is a Crystal Report.

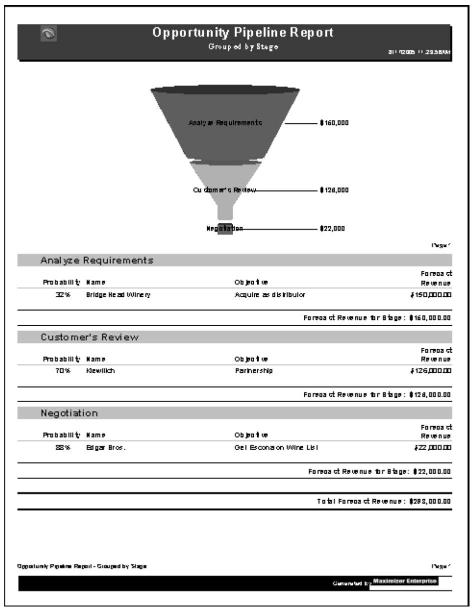
➤ To view the opportunities in the pipeline

1. In the Opportunities window, click the **Display Opportunity Pipeline Report** button.
2. You are prompted for which entries to include in the report. Make your selection and click **OK**.

   The report graphically displays all opportunities you have included in the report grouped by opportunity stage.



Display Opportunity Pipeline Report



➤ To modify the Opportunity Pipeline report

To create or modify Crystal Reports, you must have the full program installed.

1. Copy the Opportunity Pipeline report file from the **MaData6** folder in your Maximizer program folder to your Crystal Reports working folder. You should make a backup copy of the original report file just in case you need to use the file again.
2. Open **Crystal Reports** and make your changes.
3. Save your new Opportunity Pipeline report in the **MaData6** folder where you have installed Maximizer – (e.g., ...\Program Files\Maximizer\MaData6).

For more information on reporting in Maximizer, refer to "Reporting and Graphing" on page 411.

CHAPTER 6

Managing Campaigns

Market Your Products and Services

In this chapter...

"What are Campaigns?" on page 184

"Campaigns Window" on page 185

"Organizing Your Marketing Efforts" on page 186

"Creating Traditional Campaign Templates" on page 190

"Marketing with Automated Campaigns" on page 197

"Managing Automated Campaigns" on page 208

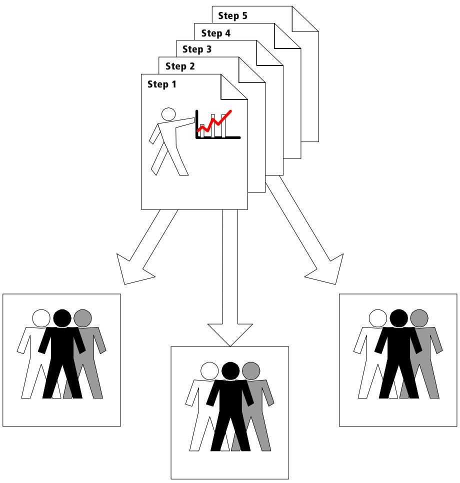
"Printing the "Hard Copy"" on page 216

What are Campaigns?

Campaigns help you and your colleagues to promote your company and to manage complex marketing campaigns.

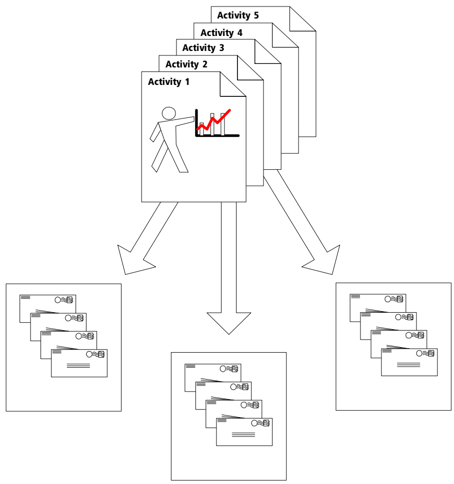
Through the use of Automated campaigns, you can broadcast your marketing message to anyone in your Maximizer Address Book. A campaign can reach out to your entire Address Book or to a single person by email, fax, or print.

Other marketing efforts require you to coordinate your marketing team for a common goal—producing an ad in television, radio, or print, for example.



Traditional Campaign Template

A Traditional campaign template provides a strategy for your teams that can be reused many times for various marketing campaigns.



Automated Campaign Template

You can send out Automated campaign message by email, fax, or printed document. An Automated campaign template defines when **and** what **is sent and can be reused for many Automated campaigns.**

In short, tracking campaigns helps you define and strengthen your marketing methodology. Your marketing team can define a campaign template—what you need to do to launch a marketing campaign and how you will address the issues and obstacles involved—and then apply this campaign template to your campaign.

Campaigns Window

? Press F1 in any window or dialog box for help.

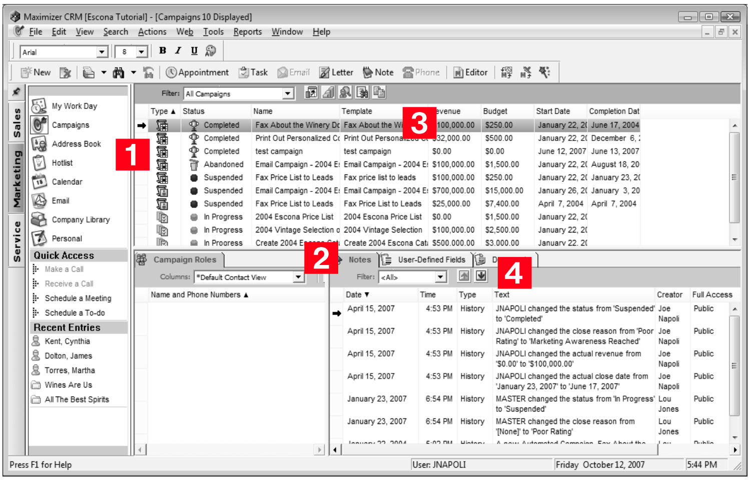
Like the Address Book window, the Campaigns window is list-based, which means your entries are displayed as items in a list.

Work with the Campaigns Window

All of your campaign-related activities are done in the Campaigns window.

➤ To work with the Campaigns window

1. Use the **icons** in the Type column to quickly distinguish Automated campaigns from Traditional campaigns.
2. The **tabbed following windows** show additional information for the selected entry. Note that the Campaign Roles following window applies to only Traditional campaigns.
3. Double-click on a **campaign** to open it.
4. Use the **view filter** to display the different types of notes that are added to record campaign activity. For more information on the various types of notes, see Maximizer Help.



Organizing Your Marketing Efforts

A Traditional campaign template defines a strategy for a marketing team; an Automated campaign template defines a series of automated actions.

Complex marketing campaigns require a well-planned strategy. When you launch a new product or promote your website, for example, you need a coherent plan and you need to coordinate the members of your marketing team towards a common goal. Traditional campaigns help you and your team manage your marketing campaigns.

Using Traditional campaigns, you can do the following:

- Create Traditional campaign templates—detailed plans that identify the factors that influence a marketing campaign and the activities you must perform to complete a campaign.
- Apply these campaign templates to one or more marketing campaigns.
- Effectively schedule and coordinate the marketing process among all members of your marketing team.
- Ensure that all the right people in your organization have up-to-date information about the status of your campaigns.
- Analyze the effectiveness of your campaign templates and create new ones for new campaigns.

The Campaigns window also allows you to record a marketing campaign without a campaign template. Without a campaign template, a campaign simply records the campaign's goal and allows you to assign a marketing team to achieve the goal; no activities or steps are defined to help your team to achieve the goal. You can use this type of campaign for simple marketing campaign objectives.

Design Campaign Templates for Traditional Campaigns

Traditional campaigns allow you to launch structured marketing campaigns in a marketing team environment. A Traditional campaign is created using one of the campaign templates in the Traditional Campaign Template Library. Campaign templates are approaches your organization uses in a marketing campaign.

If you already know how to use strategies and opportunities in Maximizer, you will have no problem learning how to use Traditional campaigns. The process is virtually identical.

Before you learn how to create a campaign template for your company, familiarize yourself with the following terms:

- **Traditional campaign template** – A campaign template is a detailed plan that defines the procedures that contribute to a successful marketing campaign. A Traditional campaign template is composed of steps, which are in turn composed of scheduled activities. For example, you could create a simple campaign template that defines the steps, activities, and roles required to place an ad in a magazine.

- **Steps** – Steps are milestones in the campaign that reflect actions you should take when pursuing a campaign. Each step represents one or more activities. One of the steps for placing an ad in a magazine might be to contact the magazine's advertising department to buy the ad space.
- **Activities** – Activities are actions that form the smallest building block in a campaign. Once a step is started, each activity is turned into a scheduled Hotlist task in Maximizer. An activity in contacting the magazine's advertising department, for example, might be to make the initial phone call to get pricing information.
- **Roles** – Roles are the known influences caused by people that affect the probability of marketing your product or service. For placing an ad, one of the roles would be your contact person at the magazine's advertising department.

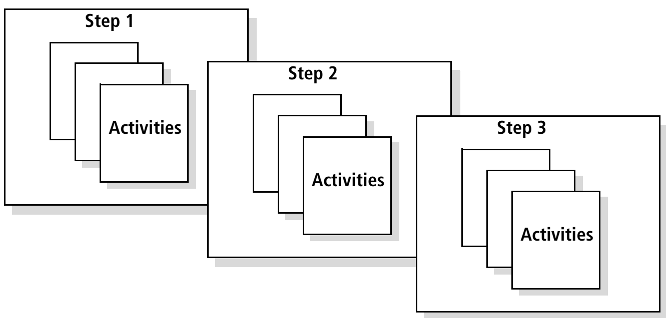
A campaign template must be a detailed plan that defines the procedures that contribute to a successful campaign. Once you create a campaign template in the Traditional Campaign Template Library, you can apply the campaign template's particular marketing plan to any new Traditional campaign you create.

Plan Traditional Campaign Templates on Paper

Before you can enter your organization's marketing strategies as campaign templates, you need to gather information from your marketing people. The best campaign templates combine the knowledge and experience of everyone in your organization; therefore, you should involve as many people in this process as possible. The result will be a pattern of success that you can follow like a road map.

Your first step is to design a general plan—a campaign template—that describes your company's steps, activities, and roles involved in completing the campaign. The most difficult step in creating a new campaign template is in the planning stage. Once you know what the steps, activities, and roles will be, you may then enter the information in the Traditional Campaign Template Library.

A campaign template consists of several steps to achieve the goal.



Each step is composed of activities—individual tasks to be performed by a member of the team.

On paper, try defining the following elements:

- **Campaign template steps** – A step is a high-level action, such as "Demonstrate the product".
- **Activities that compose each step** – An activity is the most basic building block—it is an individual task needed to complete the step, "Call to arrange appointment".
- **Campaign roles** – A role can be any person who influences the progress of a campaign.

When you have finished planning your campaign template on paper, enter your new campaign template in the Traditional Campaign Template Library.

Break Steps into Activities

Some steps may be so simple that there is no need to break them down further. In most cases, however, you will find it easier to develop a campaign template that works if you first define the major steps and then break down each step into a series of activities that you can schedule and assign to marketing team members.

Each activity is assigned to a single user or delegated to a team member as a Hotlist task. As the team members mark activities as complete, Maximizer updates the status of the campaign accordingly.

The Traditional Campaign Template Library requires you to define activities separately from steps. This allows you to use an activity in several different steps. When you assign activities to a step, you simply select them from the list of available activities.

Define the Campaign Roles

The next step in developing your campaign template is to determine the key roles—positions assumed by key people that will directly influence the outcome of a marketing campaign.

When you are defining a Traditional campaign template, you don't necessarily know who will fill these roles for each campaign. If you can define generic roles for your campaign templates—for instance, Printer or Graphic Artist—you can later use people's names for those generic roles for individual campaigns.

Traditional Campaign Template Example

The following is an example of a campaign template for placing an ad in a magazine.

Ad for Magazine

Cost: $17,700.00 Duration: 2.47 week(s)
To create new ad for a trade publication

Steps

Develop new advertising campaign
Cost: $4,500.00 Duration: 1.19 week(s)
Develop new advertising campaign

Follow-up program
Cost: $1,200.00 Duration: 4.00 day(s)
Organize necessary follow-up for marketing program

Activities - Develop new advertising campaign

Identify appropriate advertisers
Identify trade publications and magazines suited for print advertising
Cost: $2,000.00 Effort: 1.14 week(s) Priority:
With: Advertising Agency

Submit ads for the season
Submit completed print ads to all advertisers being used
Cost: $2,000.00 Effort: 5.00 hour(s) Priority:
With: Advertising Agency

Brainstorming
Brainstorming with entire marketing team and agency for new ideas and new offers for the upcoming season
Cost: $500.00 Effort: 3.00 hour(s) Priority:
With: Advertising Agency

Activities - Follow-up program

Telemarketing campaign
Develop a telemarketing campaign for the marketing program
Cost: $200.00 Effort: 2.00 day(s) Priority:

Identify target market
Compile list of geographic territories of high income 30–55 yrs & identify retailers in the area
Cost: $1,000.00 Effort: 2.00 day(s) Priority:
With: Advertising Agency

Roles

Advertising Agency

Printer

You can use the above example as a guide in the creation of your campaign template or you can design your own campaign template from scratch.

Creating Traditional Campaign Templates

? For additional help in the Traditional Campaign Template Library, press F1.

Once you have your Traditional campaign template planned on paper, entering it into the Campaigns window is easy. The Traditional Campaign Template Library is a tabbed dialog box in which you can create a library of steps, activities, and roles. You then use these elements when you add a Traditional campaign template to the library.

After you have designed a Traditional campaign template, you can then apply it to any new Traditional campaign that you create.

➤ To create a Traditional campaign template

1. Select **File > Libraries > Traditional Campaign Templates**.
2. Click **Add** and enter a name for the template.

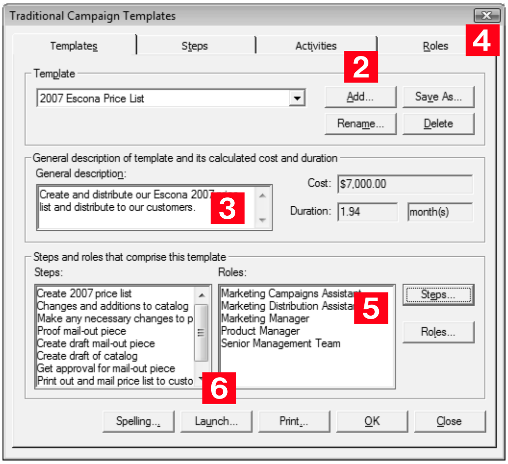
   Use the other buttons to copy (Save As), rename, or delete campaign templates.

   The Save As button in each tab lets you save the selected campaign template or element under a new name. This can be useful if you want a new campaign template (or template element) but you don't want to create it from scratch.

3. Fill in the **general description** for the campaign template.

   The cost and duration are automatically calculated from the cost and effort of the activities.
4. Each tab lets you construct a different template element. Start with the **Roles** tab and finish with the **Steps** tab before you construct your campaign template in the Templates tab.
5. When you are ready to construct your campaign template, click a button (**Steps** or **Roles**) to assign the steps and roles to your new campaign template.

6 Click **Launch** to create a Traditional campaign based on this template.



Create Traditional Campaigns

You can record campaigns without a campaign template, if you wish. Specify "Not using a campaign template" in the campaign's Template tab.

If you have planned and correctly entered your Traditional campaign template, it's easy to implement a Traditional campaign.

➤ To create a Traditional campaign

1 Select **Edit > Add Traditional Campaign** or right-click in the Campaigns window and select **Add Traditional Campaign**.

– or –

After creating a Traditional campaign template, click the **Launch** button on the Templates tab.

2 Enter the **details for the campaign** working your way through the tabs from left to right.

3 Enter the campaign's **potential revenue**. The budget is automatically calculated from the total cost of the activities (part of steps) in the campaign.

In order for campaigns to be synchronized with MaxExchange, the campaign must belong to a team.

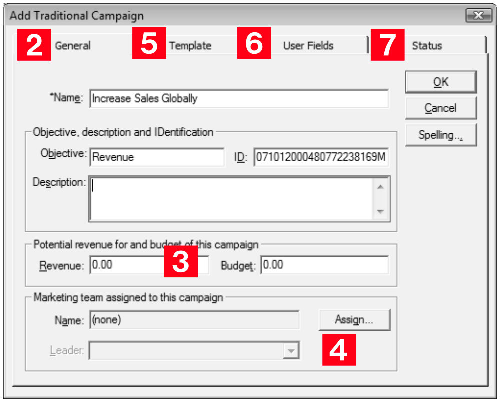
4 Assign the marketing team and leader. You can have different team members for each campaign. This assignment determines where the campaigns are synchronized if you are using MaxExchange.

5 On the **Templates** tab, you can choose a pre-defined template, which includes a selection of roles and steps for a campaign.

After assigning a template, you cannot modify the campaign to use a different template.

6 The **user-defined fields** that you can assign are specific to campaigns.

7 When a campaign is created, the **status** is automatically marked as In Progress. You update this when the status is changed.



ⓘ The ID number uniquely identifies a campaign. Your system administrator uses Administrator to control whether or not ID numbers are automatically generated.

You can begin working on the new campaign any time you wish—see "Apply and Work the Steps to Complete Campaigns" on page 195.

Assign Marketing Teams to Your Campaigns

Use the Assign button on the campaign's General tab to assign a Traditional campaign to any marketing team that has been set up by your system administrator. Teams allow you to delegate individual campaign activities to members of the marketing team. These activities appear in the team member's Hotlist for completion by the scheduled time.

Marketing Team Members

ⓘ Sales teams are used for opportunities while marketing teams are used for campaigns. Teams are set up in Administrator. For more details, see the *Maximizer CRM Administrator's Guide* or Administrator Help.

A marketing team is composed of three types of members: a team leader, a team member, and a team member with edit rights.

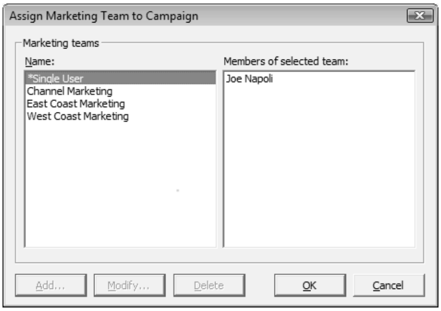
- **Team Leader** – In a team, one person is designated as a team leader who has the right to make changes to the campaign as well as to the campaign's team.
- **Team Member** – A regular team member does not have the right to change the campaign nor the team. The member's role is to perform the tasks the team leader assigns.

- **Team Member with Edit Rights** – A team leader can grant any member the right to edit the campaign, which essentially gives the same abilities of the team leader. This right must be granted on a per-campaign basis, unless your system administrator specifies otherwise.

If a Traditional campaign doesn't have a marketing team assigned, the user who created the campaign is automatically designated as the leader.

➤ To assign a marketing team to a Traditional campaign

- Click **Assign** in the campaign's General tab to view or change a team's membership for the current campaign.



Assign Contacts to Campaign Roles

Before delegating campaign activities to team members and roles, select the Traditional campaign and then assign Contacts to your campaign roles.

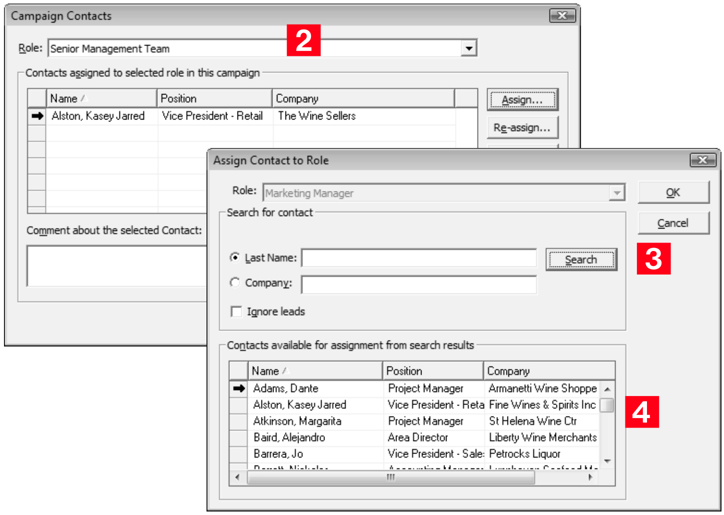
The same role can be shared among all your campaigns, however, when you assign a Contact to a role, it only applies to the selected campaign.

➤ To assign a Contact to a campaign role

Note that roles apply to only Traditional campaigns using a campaign template.

1. Select **View > Review Roles** or click the **Review Roles** button in the View bar.
2. Select a **Role** you want to delegate and click the **Assign** button.
3. Search your Address Book for the desired **Contact**.
4. Select the Contact you are assigning to the role and click **OK**.

5. Click **OK** again when you are finished assigning campaign roles.



Delegate Campaign Activities to Team Members and Roles

If you are working with a marketing team on a Traditional campaign, and you are a team leader or a member with edit rights, you have the ability to delegate the campaign's activities to individual members in the team. You can modify the team's membership or member's rights at any time.

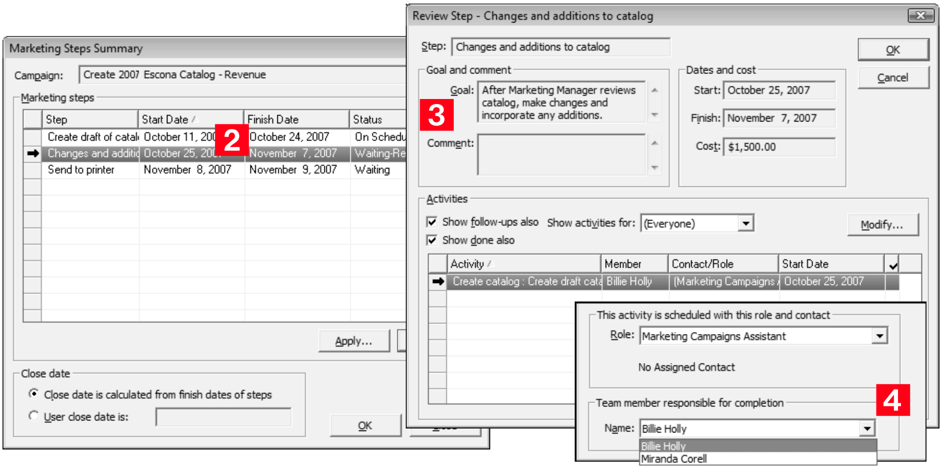
You may have some activities in your campaign that are appropriate for team members with particular skills. The editing of an agreement document, for example, might fall to your writer.

In addition to assigning activities to marketing team members, you also can schedule roles and Contacts for each activity. But first, assign a Contact to each campaign role.

➤ To delegate campaign activities to team members

1. From the **View** menu, select **Review Steps**.
2. Select a **step** that contains an activity you want to delegate and click **Review**.
3. Double-click the **activity** you want to delegate.

4 Select the **team member** to whom you are delegating the activity and select the role and Contact with which the activity is scheduled.



Apply and Work the Steps to Complete Campaigns

? Learn more about working through a campaign's steps by looking up "work the steps in a Traditional campaign" in Maximizer Help.

After you have delegated the activities to team members and Contacts, you can begin working through the steps of your campaign and marking each Hotlist task as complete.

➤ To apply and review steps

1 Click the **Marketing Steps Summary** button while a Traditional campaign is selected.

– or –

Select **View > Review Steps**.

2 Click **Apply** to initiate the step. Activities appear in the Hotlist as soon as the step is applied.

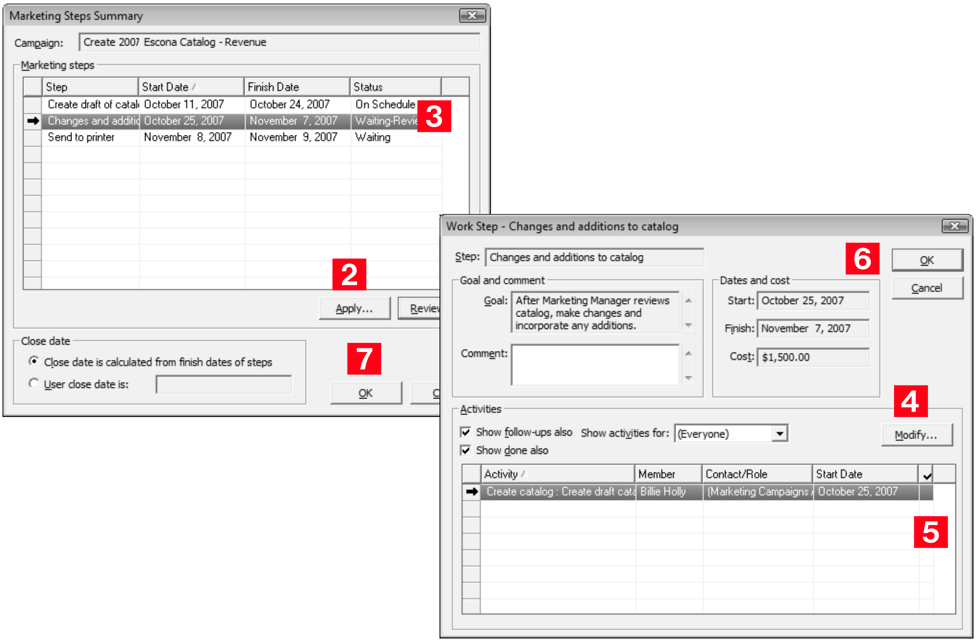
3 After applying a step, double-click the **step** or click **Work** (the Work button is not available until you have applied the step).

4 Select an **activity** and click **Modify** to change or delegate an activity.

5 Double-click the **last column** of an activity to mark the activity as complete. You may also mark the task as complete in your Hotlist.

6 Click **OK** to close the Work Step dialog box.

7 Click **OK** again to close the Marketing Steps Summary dialog box.



Pause Traditional Campaigns

Sometimes you need to suspend your efforts in a marketing campaign due to changing conditions or other factors. To pause a Traditional campaign, open the campaign and select the Status tab.

➤ To pause a Traditional campaign

1 Open the **Traditional campaign**.

2 Under Current working status, select **Suspended**, enter a reason and comment, and click **OK**. Any Hotlist tasks are archived (not available from the Hotlist) until you reset the campaign to “In Progress”.

Marketing with Automated Campaigns

Use an Automated campaign when you want to have Maximizer automatically send out email messages, faxes, or printed documents on a pre-defined schedule. An Automated campaign is very useful if you want to remind customers of a new or upgraded product that you are marketing, encourage a repeat visit to your company's website, or even just to keep in contact with the customer.

You can include merge fields in your outgoing campaign media so all recipients get messages that are customized with their names, companies, or any other fields in their Address Book entry information. You can even include merge fields in the email subject line.

Automated services are not available for MaxExchange Remotes.

You can "broadcast" email to any number of Address Book entries to support your marketing campaign. Ask your Internet Service Provider if there is a limit on how many email messages that can be sent concurrently. Use the Preferences > Automated Services tab in Administrator to control the cycle time check; these settings can be viewed by users in the same tab.

The character set used by the Maximizer Email Service is specified in the Preferences > Automated Services tab in Administrator.

There are two main types of Automated campaigns:

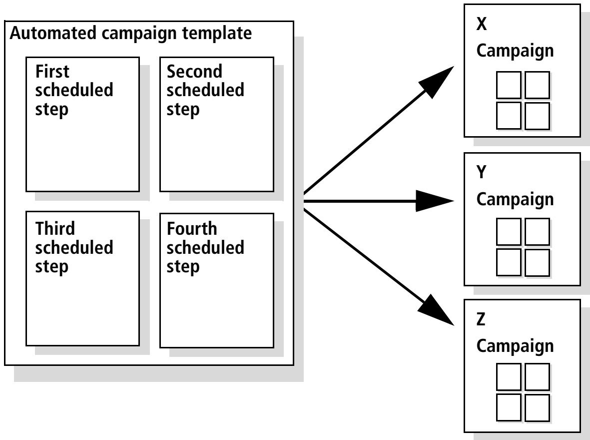
Fixed-Date – These campaigns run for a specified time period. When you apply this type of campaign to a new Address Book entry, all activities of the campaign are applied within the fixed time period. For example, if you launched a campaign comprising five activities, and the first two activities were already completed when a new Address Book entry is added to the campaign, these two activities are applied immediately. The remaining activities are applied as scheduled.

Ongoing – These campaigns repeat indefinitely unless you change the status to suspended. You can add a new Address Book entry at any time during the campaign cycle. When a new Address Book entry is added, the entire campaign is run from start to finish, at the set time intervals. For example, if there is a duration of one week between a set of four email messages, each message will be sent one week apart, regardless of when an Address Book entry is added to the campaign.

Creating an Automated campaign requires that you first define a campaign template. The Automated campaign template defines the actions that occur when you implement a campaign; each template contains a series of scheduled activities that must be performed in order to complete the Automated campaign.

When you create a campaign, select which campaign template you want to use, or create an entirely new campaign template with a new set of activities. Think of a campaign as a single implementation of one of your Automated campaign templates. Each time you create an Automated campaign, you are applying an instance of an

Automated campaign template. The same Automated campaign template can be implemented over and over in the form of several campaigns.



Design Automated Campaign Template Activities

? Press F1 for help with any Automated campaign template dialog box.

An Automated campaign template determines the actions that occur during a campaign. The campaign template sets out in precise terms which activities to use and when to send the campaign media (email, fax, or printed document). You can schedule as many activities in a campaign template as you need.

Plan Your Activities

An automated campaign activity is sending an email message, a fax, or a printed document. For reference purposes, an email message, a fax, or a printed document is also referred to in this document as campaign message.

When adding activities to a campaign template, you will need to plan some details ahead of time, including the following:

- How many email messages, faxes, or printed documents you want to send.
- Which file types to use for the campaign activity.
- How many days after the campaign is launched that the campaign message is sent.

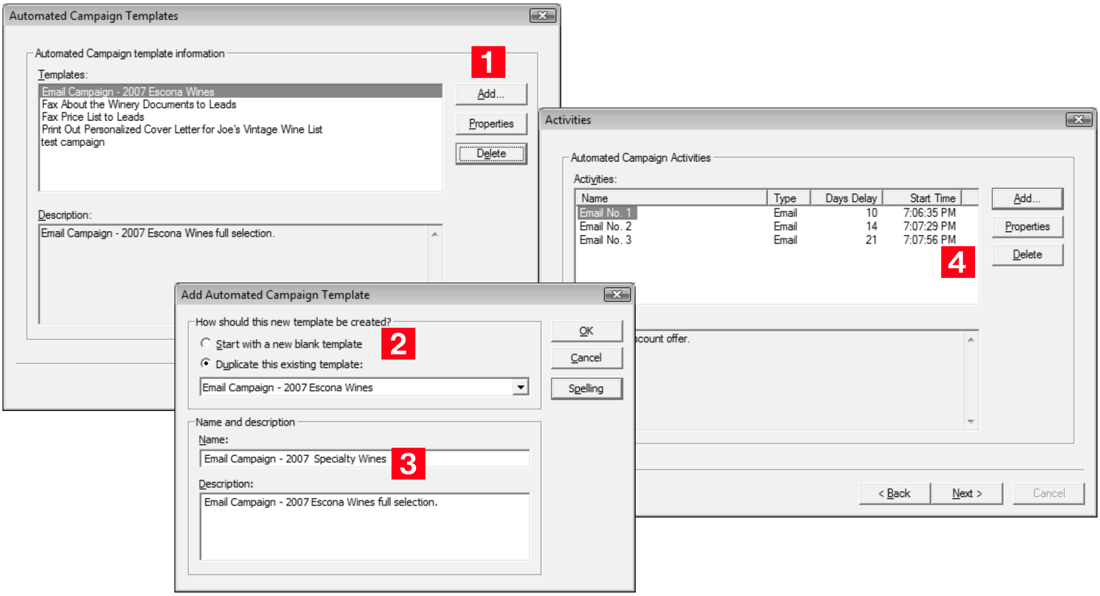
Create Automated Campaign Templates

Once you have a plan worked out, you can start adding activities to your campaign template.

➤ To create a new Automated campaign template

1. Select **File > Libraries > Automated Campaign Templates**. The Automated campaign wizard opens. Click **Add**.
2. Choose whether you are creating an entirely **new campaign** template or one that is based on an **existing campaign template**. If you choose to base the new campaign template on an existing campaign template, Maximizer copies the content of the existing campaign template into your new campaign template.
3. Type a **name** and **description** for the new campaign template and click **OK**. Click **Next**.
4. In the **Activities** wizard page, use the **Add**, **Properties**, and **Delete** buttons to define the series of activities that comprise this template. When adding activities, you are prompted to specify the type of activity—email, fax, or print. See “Define Activities for Your Automated Campaign Templates” on page 200 for more information. Click **Next**.
5. If you want to immediately launch an Automated campaign based on the template you just created, select the **Launch a new campaign based on this template** option.

6. Click **Finish** to save the template.



Define Activities for Your Automated Campaign Templates

An activity is an email message, a fax, or a printed document that is sent out a certain number of days after an Automated campaign is launched using a campaign template. You can add as many activities as you want.

➤ To define automated campaign activities

1. Select **File > Libraries > Automated Campaign Templates**.
2. If you are adding a new campaign, click **Add** and enter a **name** and **description** for the template. Leave the **Start with a new blank template** option selected unless you would like to start with a copy of the selected template, in which case you choose the **Duplicate this existing template** option.
3. Click **OK** to close the **Add Automated Campaign Template** dialog box and then click **Next** in the **Automated Campaign Templates** wizard screen.
4. In the **Activities** wizard page, click **Add**. Select the type of activity—**Email**, **Fax**, or **Print**.

   To modify an activity, select it and click **Properties**.

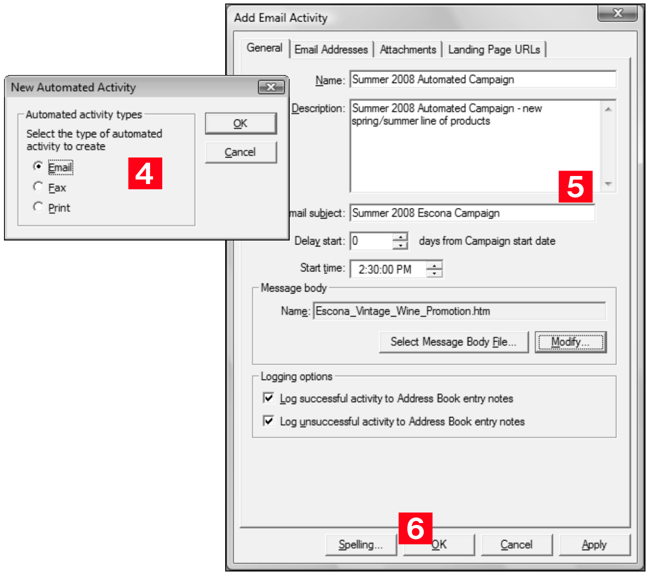
5 Enter the **details of the campaign activity** in the Add [Email, Fax, or Print] Activity dialog box.

- Enter the **Name** and **Description**.
- For fax and print campaigns, select a **printer**. The list includes all printers and fax applications installed on the Maximizer Automated Services computer (Maximizer server) that have been initialized for the fax/print service through Administrator.
- For email activities, enter an **Email subject** or click the ellipsis button to insert a standard merge field into the subject line of the email message.
- For ongoing campaigns, enter the **Delay start [number] of days from campaign start date**, which defines the number of days after the campaign template is launched to send this email message. When reviewing an activity, "Delay of days to start activity" becomes "Start date" and a pop-up calendar becomes available for you to select a calendar date. For fixed-date campaigns, choose a **Start date**.
- Specify the **Start time**, which defines the time of day the campaign media should be sent.

New email activities can be created as a Maximizer document (.ETF file) or an .HTML file. Fax and print activities can be created as a Maximizer document or a Microsoft Word document (.DOC file). Message body templates are stored in the Address Book (database), so everyone can access them from the library.

- Click the **Select Message Body File** button to access the list of saved templates (body files). From there, you can create, modify, or import a new template. You can also save templates under a different name or export them to a specified location. It's important to first save your template in its associated editor before clicking the OK button in the General tab. The actual message body is saved as part of the activity (in the Address Book or database) once you click OK in the General tab of the Activity dialog box.
- Choose your **Logging options**. A note is created for the Address Book entries involved in the campaign if the campaign activity is successful or if the activity fails.

6 If you are creating an email activity, continue with the following steps. For fax and print activities, click **OK** to save the activity.



Recipients will see the name and email address that you enter here so it should be recognizable by the recipients. For example, the name could be your company name, as in Maximizer Software, and the address could be something like promos@maximizer.com.

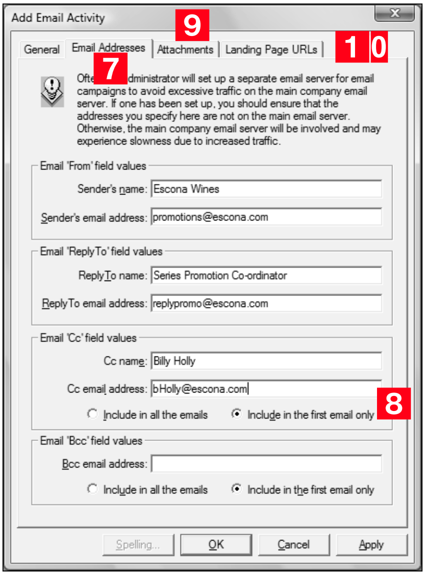
7 Select the **Email Addresses** tab at the top of the Add Email Activity dialog box. Specify a sender name and address.

Specify a "reply to" name and address. Replies to the email activity are sent to this address. If you are targeting a large audience, it may be useful to set up an email address specifically for replies.

If you wish, use the "Cc:" and "Bcc:" fields to define a "carbon copy" or "blind carbon copy" recipient. This can be useful if you want to send a copy of an email message to yourself or to another person in your company, as well as to the targeted recipients.

8 Use the **Include in all the emails** or **Include in the first email only** options to ensure the Automated campaign is working by sending someone, such as yourself, a copy of the email message for this campaign activity. The cc and bcc recipients can receive a

message for each Address Book entry (first option) or just the first Address Book entry in a batch (second option).



9 Select the **Attachments** tab and click **Add** to add any attachments.

10 On the **Landing Page URLs** tab, specify up to five landing page URLs—these pages apply to email activities only. When you use a Campaign_Redirect_URL merge field in your email message template, the customer is redirected to a landing page URL (when the customer clicks on the Campaign_Redirect_URL merge field). A landing page URL can be any URL—for example, your company website. For more information, refer to "Campaign Merge Fields" on page 205.

11 Click **OK** to finish creating the activity.

Address Book entry recipients are selected when you actually launch the Automated campaign.

Your system administrator controls how many automated activities can be sent at one time by grouping them into batches (e.g., 100 email messages) and setting a minimum cycle time between batches (in minutes, hours, days, weeks, or months). This reduces the load on your email server, printer, or fax by spacing out large quantities of activities.

Create Message Templates for Automated Campaigns

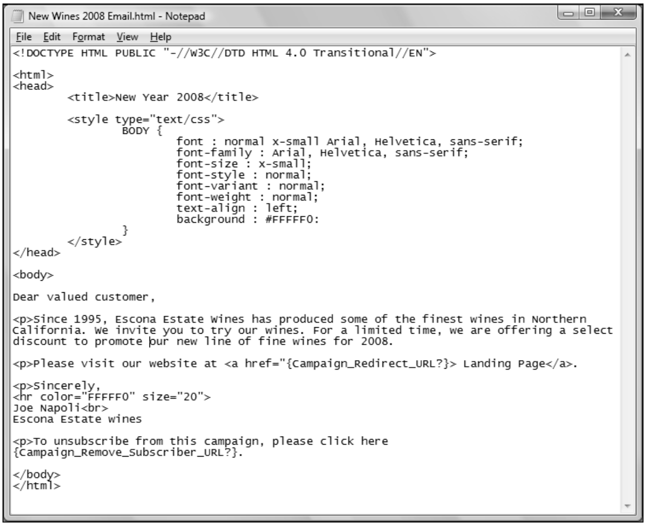
The principal action of an Automated campaign is to send a message to one or more recipients by email, fax, or printed document. These messages are based on templates you create using the Automated Campaign Template Library. Templates can be done using the Maximizer Word Processor (text files) or through any HTML editor (HTML files).

When you construct an Automated campaign template, you choose a message template to use for each email. Email templates can contain merge fields that are replaced with the recipients' information when the email message is sent. For example, your template's salutation might be "Dear {Mr_Ms?} {Last_Name?}" or "Dear {First_Name?}". These merge fields are replaced with a Contact's name, as in "Dear Ms. Kaworski".

➤ To create email message templates

If you are using Microsoft Word as your HTML editor, you cannot insert merge fields by using the Merge Field button on the Maximizer toolbar. You must copy the syntax of the merge field from a Maximizer Word Processor document or type the syntax into your HTML document.

1. Open your **HTML editor**.
2. Edit or write your **email template's content**, inserting Maximizer merge fields where appropriate. To insert a merge field, copy the syntax from the Maximizer Word Processor or type in the merge field syntax. For more information on inserting merge fields, see "Use Merge Fields in Document Templates" on page 129.




```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN">

<html>
<head>
        <title>New Year 2008</title>

        <style type="text/css">
                BODY {
                        font : normal x-small Arial, Helvetica, sans-serif;
                        font-family : Arial, Helvetica, sans-serif;
                        font-size : x-small;
                        font-style : normal;
                        font-variant : normal;
                        font-weight : normal;
                        text-align : left;
                        background : #FFFFF0:
                }
        </style>
</head>

<body>

Dear valued customer,

<p>Since 1995, Escona Estate Wines has produced some of the finest wines in Northern
California. We invite you to try our wines. For a limited time, we are offering a select
discount to promote our new line of fine wines for 2008.

<p>Please visit our website at <a href="{Campaign_Redirect_URL?}> Landing Page</a>.

<p>Sincerely,
<hr color="FFFFF0" size="20">
Joe Napoli<br>
Escona Estate Wines

<p>To unsubscribe from this campaign, please click here
{Campaign_Remove_Subscriber_URL?}.

</body>
</html>
```

In the above example, an email message will be sent to notify the recipients of a product discount. The message template uses two of the available merge fields for automated campaigns—Campaign_

Redirect_URL and Campaign_Remove_Subscriber_URL. For more information on campaign merge fields, refer to "Campaign Merge Fields" on page 205. You may want to write several message templates for different types of campaigns, such as a thank you message, a reminder to visit your online catalog, or a newsletter. First browse through the existing Maximizer templates to see what you can use.

Maximizer is capable of sending text and HTML email messages, in addition to the regular email template file (.ETF) format created by the Maximizer Word Processor. Use an editor of your choice to create your HTML or text files.

The easiest way to use merge fields in HTML is to create an email template using the Maximizer Word Processor, inserting the desired merge fields, and then copying the template (with the merge field syntax included) into the HTML file. You can choose the HTML file when you are setting up your activity.

Campaign Merge Fields

There are merge fields available in the Maximizer Word Processor that are specific to automated campaigns. These merge fields can be extremely useful for tracking customer information regarding resulting visits to your website and opened campaign email.

Although some of these merge fields can be used in .ETF and .TXT files, they are best suited for HTML.

- **Campaign_Opened_Email_Tracking_URL** – This merge field tracks the number of customers that have opened an automated campaign email message. It can be used with only HTML message templates. When a customer opens a campaign email message, the "opened count" is updated in the Review Automated Campaign dialog box and in the Automated Campaigns following window (Edit > Open Automated Activities List).

For more information on the dialog boxes where the campaign tracking statistics appear, press F1 to see the context-sensitive help.

- **Campaign_Redirect_URL** – This merge field tracks how many customers hit your website as a result of an automated campaign email message. The redirect URL calls an ASP page, which is installed and configured at the time of installing Maximizer. If necessary, the redirect script location can be modified in File > Preferences > Automated Services tab in Administrator. When a customer clicks on this URL, the website hit is updated in the Review Automated Campaign dialog box and in the Automated Campaigns following window (Edit > Open Automated Activities List).
- **Campaign_Remove_Subscriber_URL** – This merge field unsubscribes customers from an automated email campaign. When a customer clicks on this URL, the Do Not Solicit By field is updated for the entry (Basic Information tab)—the customer's entry is marked to not be solicited by email.

- **Service_Computer_Name** – This merge field identifies the automated services computer (Maximizer server) from which the automated email message was sent. Typically, you could use this internally through a hidden tag in your HTML. This field would be useful when you have more than one automated services computer running campaigns.

Following is an example of what your HTML syntax would look like if you use all four merge fields in the body of your email message.

```
<HTML>
<body>
 <img src="{Campaign_Opened_Email_Tracking_URL?}">
<br>
Please click on link:
<br>
 <a href="{Campaign_Redirect_URL?}">Landing Page</a>
 <br>
 Please click here to remove yourself from any campaign
 <a href="{Campaign_Remove_Subscriber_URL?}">Unsubscribe
from campaign</a>
 <br>
 You are receiving email from this Service Computer,
{Service_Computer_Name?}.
</body>
</HTML>
```

Launch Automated Campaigns

An Automated campaign is essentially an implementation of one of your Automated campaign templates. You can launch as many campaigns as you like using the same campaign template and manage them in the Campaigns window as you would for a Traditional campaign.

An Automated campaign is always associated with one or more Address Book entries—the Address Book entries are the recipients of the messages sent in the campaign. Before you attempt to launch an Automated campaign, you must select the Address Book entry recipients.

➤ To launch an Automated campaign

1. Select **Edit > Add Automated Campaign**.

   – or –

   Right-click in the Campaigns window and select **Add Automated Campaign**.

2. Choose the type of campaign you want to create—**Fixed-Date** or **Ongoing**.

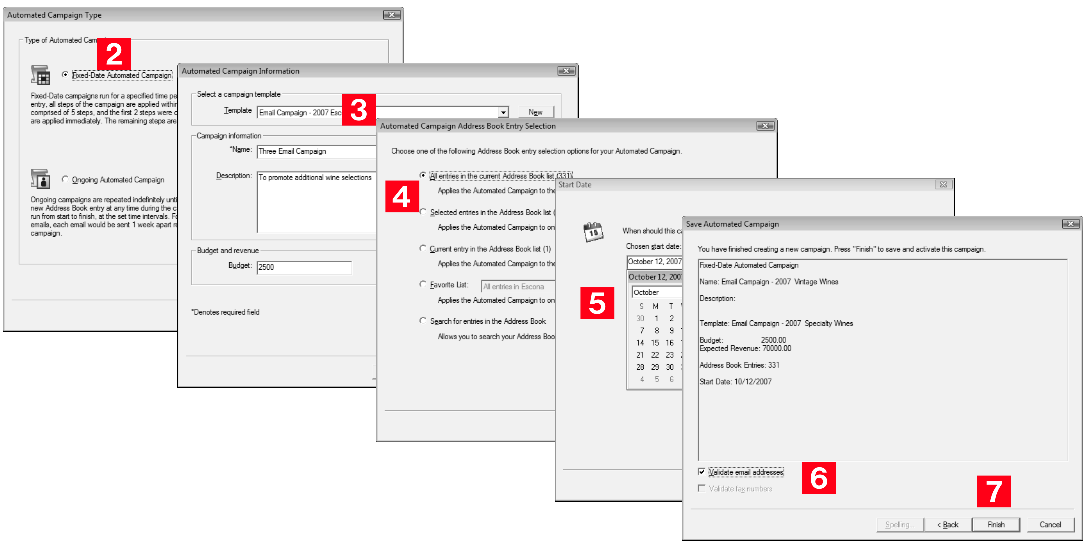
3. Choose the **template** on which this campaign is based. Also, enter the **name**, **description**, **budget**, and **expected revenue**.

4. Choose the Address Book entry **campaign recipients**. The Favorite List option is effective for a large number of subscribers.

5. Select the **date** to begin the campaign.

6. Select the **Validate email addresses** option to be notified of any blank email addresses or those missing the @ symbol, or choose **Validate fax numbers** to be notified of invalid fax numbers.

7. Click **Finish** to save and launch the campaign.



Managing Automated Campaigns

Now that you have created Automated campaigns, you need to manage their progress. Although an Automated campaign will continue without further intervention, sometimes daily events require you to suspend a campaign, view a campaign's Address Book entries, or remove Address Book entries from a campaign.

View and Modify Automated Campaign Information

Once a campaign has been created with the Automated Campaign wizard, you can view and modify the details of an automated campaign by opening the campaign and looking at the various tabs. The following procedures outline specific tasks that you would do on some of the tabs.

➤ To view and modify Automated campaign information

1. In the **Campaigns** window, double-click on the Automated campaign. Automated campaigns are denoted by a special symbol, as shown below, in the Type column.
2. The **Basic Information** tab contains the basic information about a campaign. Modify the information as necessary.

For information on selecting products/services and categories, see Maximizer Help.

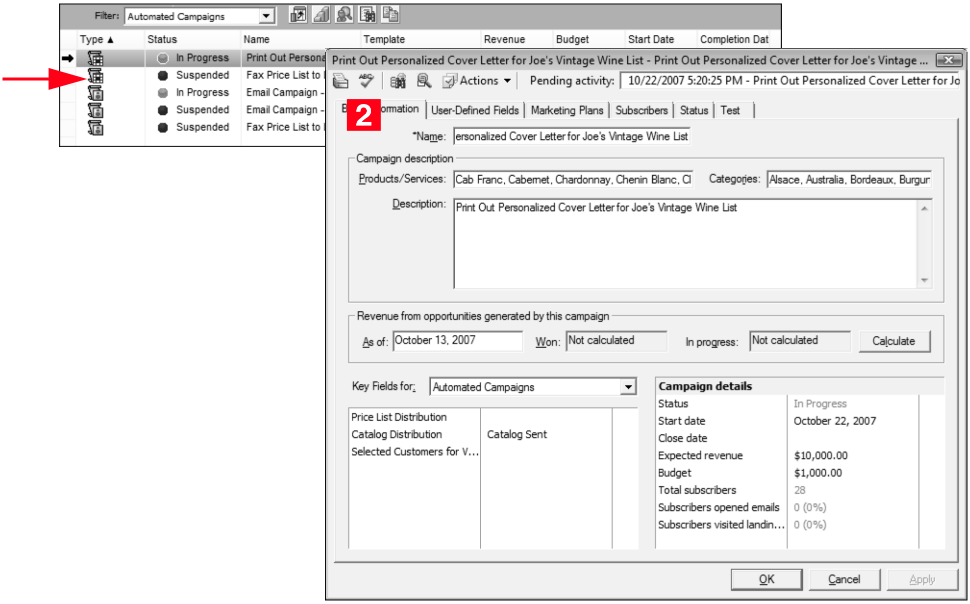
- Select products/services and categories related to the campaign.

  Select the values for the campaign **Key fields**. These are user-defined fields defined as important to your company and are set up in Administrator. These fields are specific to all campaigns.

  Select the values in the **Campaign details** section of the tab. These are pre-existing fields in Maximizer and cannot be customized. The **Subscriber's opened emails** and **Subscriber's visited landing pages** are the incremental counts of each time a customer opens one of the email messages in a campaign or each time a customer visits one of the URL landing pages. This count is not incrementally updated for each

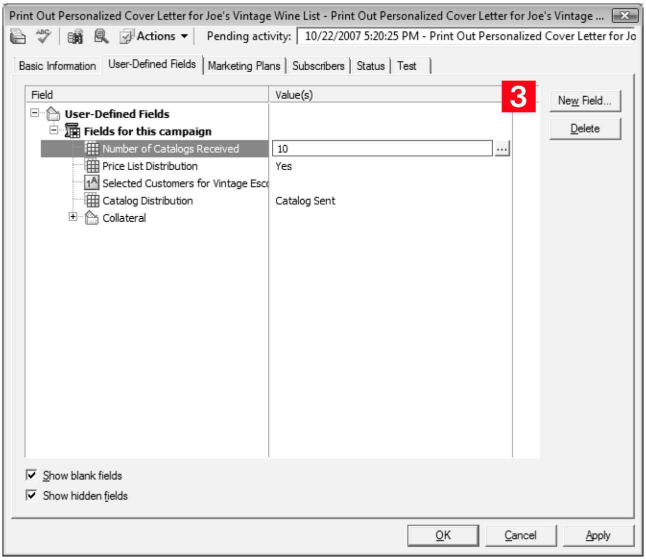
activity, and it is incrementally updated only once per campaign for each customer.

This symbol denotes an Automated campaign.



3 Click the **User-Defined Field** tab to view and modify information related to campaign user-defined fields. Note that these user-defined fields are specific to campaigns and are defined as user-defined fields for campaigns (the type is

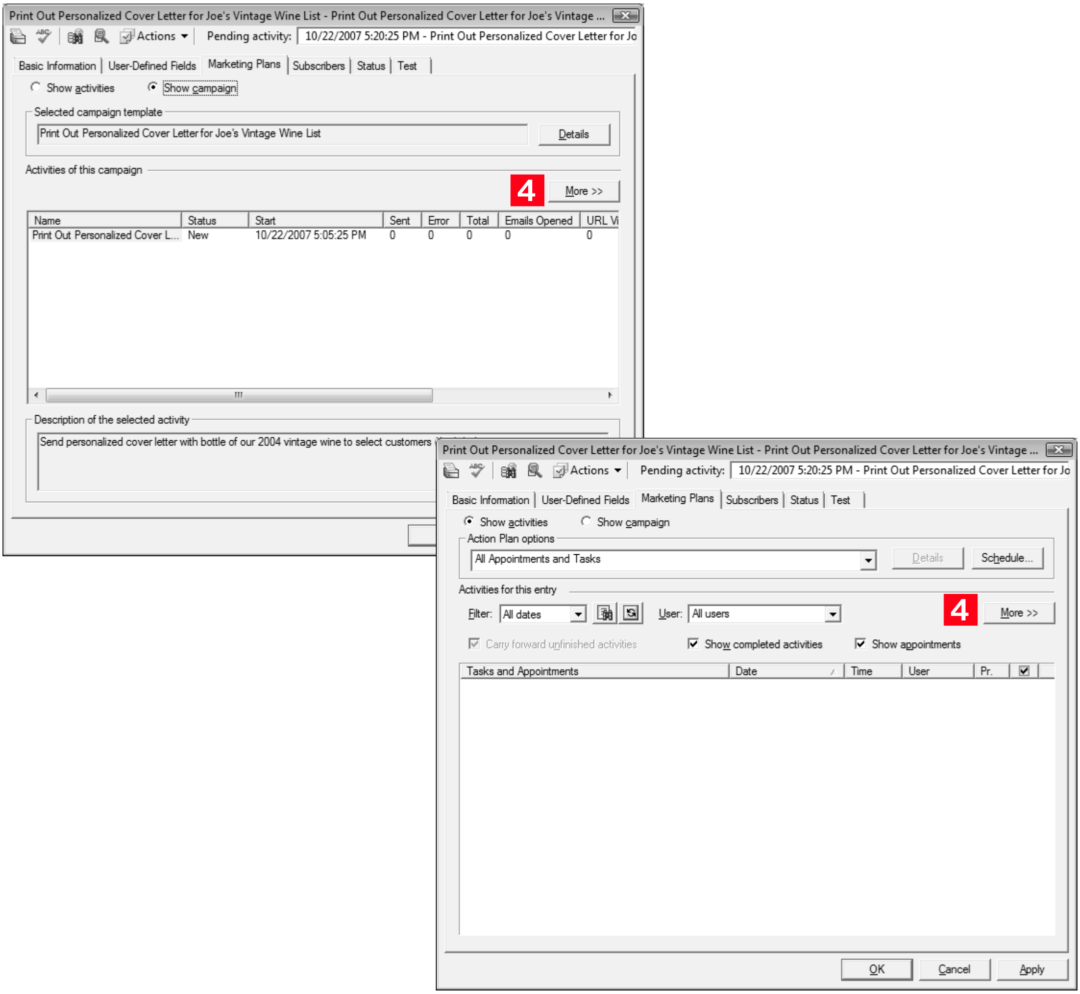
specified in the Add User-Defined Field dialog box). You can add new campaign user-defined fields by clicking **New Field**.



4 Click the **Marketing Plans** tab and select the **Show Campaign** option to view all information related to the campaign. In this tab, you can add, modify, delete, and pause/resume activities in the campaign using the **More** button. (To modify, delete, or pause/resume an activity, select the activity first.)

You can also use the Marketing Plans tab to view, modify, add, and delete non-automated tasks and appointments that are related to the campaign, but are not part of the campaign template. For example, you may want to create a task to arrange for your IT department to set up the URL landing page. These tasks and appointments can be integrated into campaigns as Action Plans—see "Use Action Plans to Create Appointments and

Hotlist Tasks" on page 94 for more information on how to create Action Plans.



5 Follow the upcoming procedures for task-specific instructions for common tasks performed in each of the Automated campaign tabs.

View Campaigns' Address Book Entry Lists

Each Automated campaign in your Campaigns window targets one or more Address Book entries. You can quickly retrieve a list of the campaign's subscribed Address Book entries and display it in the Address Book window.

You can also view a list of Address Book entries who have opened an email message for an Automated campaign or a list of entries who have clicked on a campaign landing page URL. Yet another option is to view a list of Address Book entries for a selected campaign activity.

If you wish to print the list of Address Book entries retrieved from any of these menu commands, you can print a Column Report.

➤ To retrieve a campaign's list of subscribed Address Book entries

- In the Campaigns window, right-click on the Automated campaign and select **Retrieve Address Book Entries** from the shortcut menu. The current list in the Address Book window is replaced with a list of the campaign's Address Book entries. You can also retrieve the Address Book entries for which the campaign was not successful by right-clicking and selecting **Retrieve Unsuccessful Address Book Entries**. This information is also available in the Automated Campaigns following window through the same menu items.

➤ To retrieve a campaign's list of Address Book entries who have opened email or clicked URLs

- In the Campaigns window, right-click on the Automated campaign and select an item from the shortcut menu as follows:

  To retrieve Address Book entries who have opened email messages, select **Retrieve Opened Emails Address Book Entries**. To retrieve Address Book entries who have clicked on a landing page URL, select **Retrieve Clicked-Through Address Book Entries**. Depending on which option you select, the current list in the Address Book is replaced with a list of entries who have opened email or with a list of entries who have clicked on a landing page URL. This information is also available in the Automated Campaigns following window through the same menu items.

➤ To retrieve Address Book entries for campaign activities

- In the Campaigns window, right-click on the Automated campaign, select **Address Book Entries by Activity**, and then select the activity for which you want to retrieve Address Book entries. Options for specifying which entries are retrieved include: **All subscribers**, **Unsuccessful entries**, **Opened email entries**, and **Clicked-through entries.**

Remove Address Book Entries from Campaigns

You can flag Address Book entries to not be included in specific types of campaign activities by using the "Do not solicit by" field on the Basic Information tab.

Occasionally, you may need to remove entries from an Automated campaign. For example, certain recipients may ask to be removed from a mailing list or you may want to modify the list for other reasons.

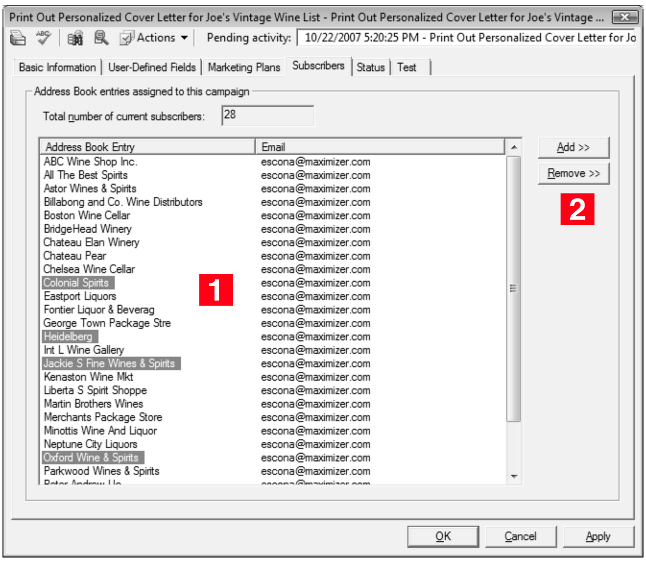
➤ To remove an entry from a campaign

1. Select the **Address Book entry** you would like to remove from the campaign in the Address Book window.
2. Open the **Automated Campaigns** following window.
3. Right-click and select **Unsubscribe from Selected Campaign**.

➤ To remove several entries from a campaign

You can test the campaign using the Test tab. When you run a test, all the activities in the campaign are sent to the "test list" at once.

1. Select the **entries** you would like removed from the campaign in the **Subscribers** tab of the campaign.
2. Click **Remove**. The entry is no longer subscribed to the campaign.



Add Address Book Entries to Campaigns

You can easily add Address Book entries to a campaign. Entries that are added to a campaign after it is launched are handled differently depending on whether you launched a Fixed-Date or Ongoing Automated campaign. See "Marketing with Automated Campaigns" on page 197 to learn at what point in the Automated campaign the new entries will be added.

➤ To add an Address Book entry to a campaign

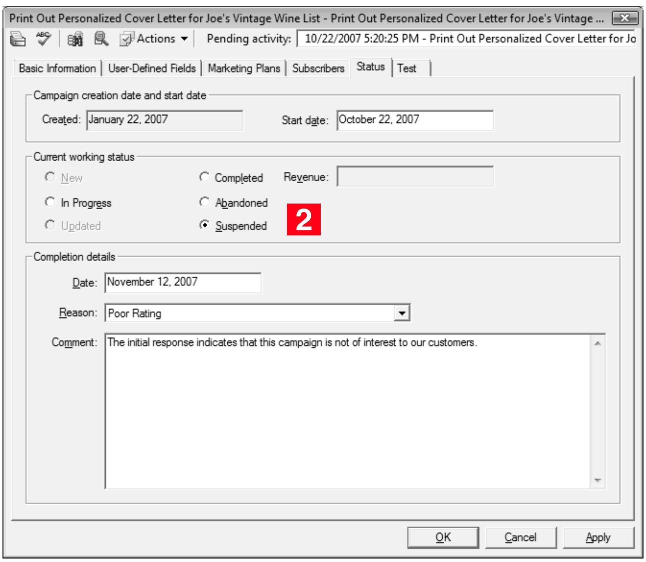
- Click **Add** in the **Subscribers** tab.

Suspend and Resume Automated Campaigns or Activities

Sometimes you need to suspend your efforts in a marketing campaign due to changing conditions or other factors. To pause an Automated campaign, open the campaign and select the Status tab.

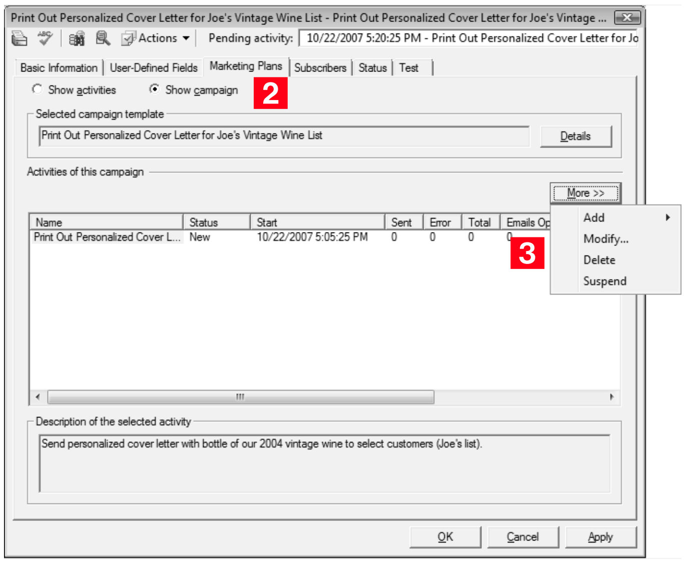
➤ To suspend and resume an Automated Campaign

1. Open the **Automated campaign**.
2. Select the **Status** tab. Under the Current working status, select **Suspended** and click **OK**. You can resume this campaign any time by changing the status to **In Progress**.



➤ To suspend and resume an automated activity

1. Open the **Automated campaign**.
2. Select the **Marketing Plans** tab and click the **Show campaign** option.
3. Select the **activity** you want to suspend, click **More**, and select the **Suspend** option.



To resume an activity once it has been suspended, select the **activity** and select the **Resume** option.

Review and Retry Automated Campaign Activities

You can review the status of Automated campaign activities for each subscriber and retry activities that have failed.

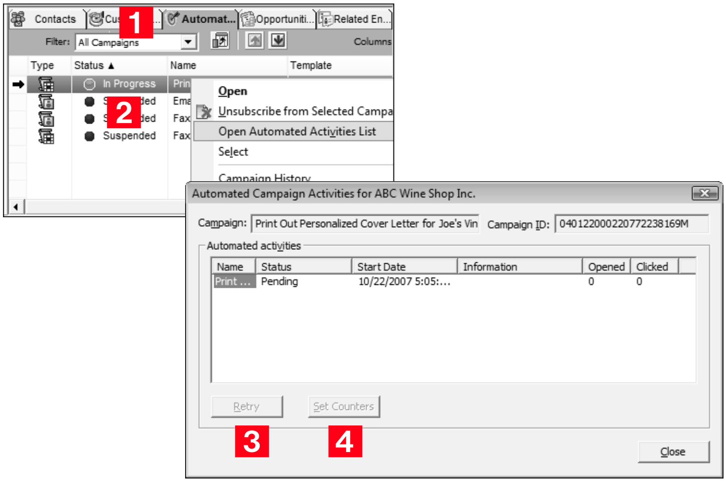
➤ To review Automated campaign activities for each subscriber of a campaign

1. While the Address Book entry you are viewing activities for is active in the Address Book window, open the **Automated Campaigns** following window.
2. Select a **campaign**, right-click, and select **Open Automated Activities List**.

3 If a campaign activity has failed, you can try to perform the activity again by selecting the activity and clicking **Retry**.

The Set Counters button is available for only print and fax campaign activities. You use the Opened and Clicked columns for tracking fax and print collateral customer responses. Email activities cannot be reset as the count is updated dynamically.

4 To reset the counters for print and fax campaign activities, click **Set Counters**. These counters are set up through merge fields available for email campaigns. See "Campaign Merge Fields" on page 205 for more information.



Printing the "Hard Copy"

There are a few different ways to print information from the Reports menu in the Campaigns window. Column reports are a fast way to print information as it appears in your current list, while a Detailed report lets you print more detailed information. The Note report can print your campaign notes.

If you need to print more complex reports on your campaign information, use the report options in Reporter or Maximizer. If you have Crystal Reports installed, you can use Maximizer to generate your own Crystal reports.

Column Report

The Column report is a standard report that lets you print the information in the selected window. Because the Column report prints the information in the same format that appears in your column setup, you know exactly what information is going to be printed. The Campaigns window allows you to change your column

setup, so you can display and print as much or as little information as you need.

Detailed Report

The Detailed report allows you to print more information than the column report. When you print a Detailed report from the Campaigns window, you can choose to print activities, roles, steps, user-defined fields, document summary, and notes.

Note Report

A Note report prints the notes for the Campaigns window. You can choose to print the notes for all entries or just the selected entry.

Following are the note types created related to campaigns:

- **Email** – Created each time an email message is sent as part of an Email activity.
- **History** – Created when campaigns are added or changed.
- **Manual** – Added manually to the Notes window.
- **Other** – Third-party or custom notes created by your system administrator.
- **Tasks** – Created when a Traditional campaign activity is scheduled or completed or when a follow-up task is scheduled.
- **Mail-outs** – Created each time a fax is sent out or a print job occurs for an automated campaign activity.

CHAPTER 7

Providing Customer Service

Providing the Key for Success with Customer Service

In this chapter...

"Customer Service Windows" on page 220

"Creating Customer Service Cases" on page 223

"Assigning or Escalating Cases" on page 231

"Resolving Cases" on page 232

"Monitoring Cases" on page 234

"Creating and Viewing Case Reports" on page 236

"Sending Automatic Email Notification about Cases" on page 237

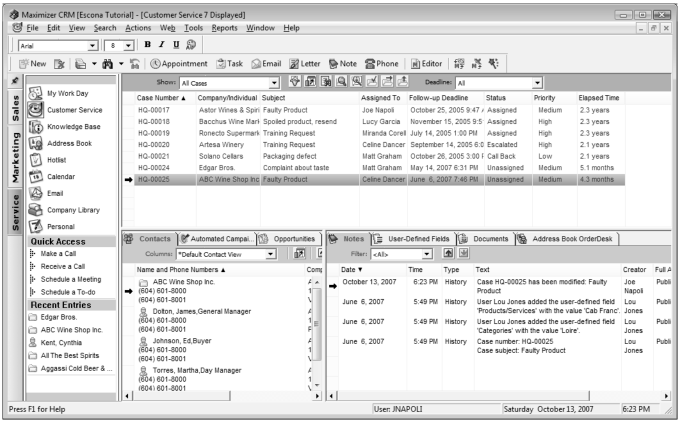
"Recording Case Solutions in the Knowledge Base" on page 240

The Customer Service window supports and enhances your existing customer service business processes. All Address Book entry customer service communication can be recorded, categorized, and escalated appropriately to ensure issues are dealt with in a timely manner.

Customer Service Windows

The following information introduces you to the Maximizer windows and dialog boxes that pertain to customer service cases. Familiarize yourself with this information before using the procedures in this chapter.

Customer Service Window



To change the displayed columns, select View > Column Setup or click the Column Setup button on the View bar.

When working with the Customer Service window, keep the following point in mind:

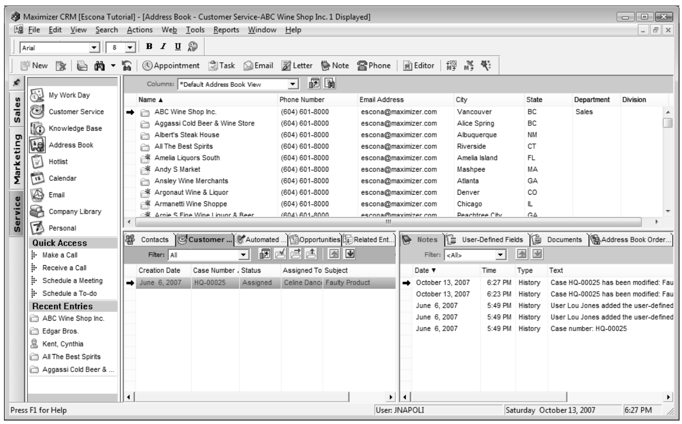
- Cases are displayed in red when they are older than the follow-up deadline specified for the case.

View Bar

The Customer Service window is list-based like the other Maximizer windows. For quick access to frequently used options in the Customer Service window, use the View bar buttons. For example, to quickly escalate a case, click the last button, which escalates the case.

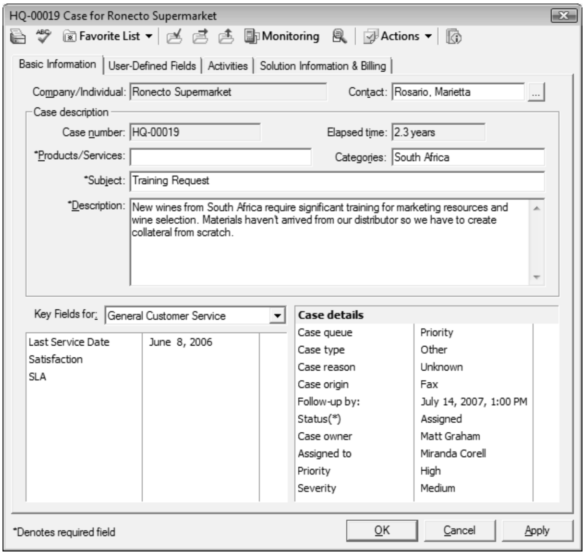
- Use the **Show** drop-down list to display cases assigned to you or show other queues. You can also use the Status Filter button to filter cases by status (the filter is also available through View > Status Filter).
- Use the View bar buttons to resolve, assign, and escalate cases.
- View cases according to deadline using the **Deadline** drop-down list.
- You can view the Address Book entries associated with a single case or multiple cases by clicking the **View in Address Book** button in the View bar or by choosing the option from the right-click menu.

Customer Service Following Window



When the Address Book window is active, you can select the Customer Service following window to display the customer service cases associated with the selected Address Book entry. You can add and modify cases for the selected Address Book entry only.

Case Dialog Box



Double-clicking a case in the Customer Service window or following window opens the Case dialog box for an existing case. The toolbar buttons at the top of the dialog box enable you to quickly assign, resolve, escalate, or change the monitoring for a case. The information about the case itself is entered in the Basic Information, User-Defined Fields, and Solution Information & Billing tabs.

Creating Customer Service Cases

Create customer service cases to track and resolve customer service issues.

➤ To create a customer service case

For detailed information on each field in the Case dialog box, select the window, dialog box, or tab you want information about and press F1.

1. A customer service case is always associated with a customer, so open the **Address Book** window and find the Company, Individual, or Contact who is associated with this case.

2. Select the Company, Individual, or Contact entry and drag it to the **Customer Service** icon or the **Customer Service** following window.

   You can also right-click in the **Customer Service** following window and select **Add Customer Service Case** from the shortcut menu.

   The **Company/Individual** field is filled in automatically with the name of the Company or Individual you selected previously. If you selected a Contact, the **Contact** field is also filled in automatically. If not, you can click the ellipsis button to select a contact to associate with the case.

   When assigning a Contact, you can add a new Contact to the associated Company or Individual by clicking the ellipsis button beside the **Contact** field, and then clicking the **New Contact** button in the Assign Contact to Case dialog box.

For information on selecting products/services and categories, see Maximizer Help.

3. In the **Products/Services** and **Categories** fields, select the product line(s) or service area(s) to which the case pertains.

4. Select a **Subject** from the drop-down list.

   To add a new Subject to the list, select **Edit List** and add a new entry.

5. Enter a **Description** of the case.

Mandatory user-defined fields and Key Fields are set up in Administrator.

6. Select the **Key Fields list** (a group of key fields specific to the module) and specify a value for the **Key Fields**. These are common used fields that are specific to your company.

   Up to eight Key Fields can be specified for customer service cases. Key Fields are set up in Administrator—they will not appear in Maximizer unless they have been specified. For more information on Key Fields, refer to “Use Key Fields” on page 494. You can also refer to the *Maximizer CRM Administrator’s Guide* if applicable.

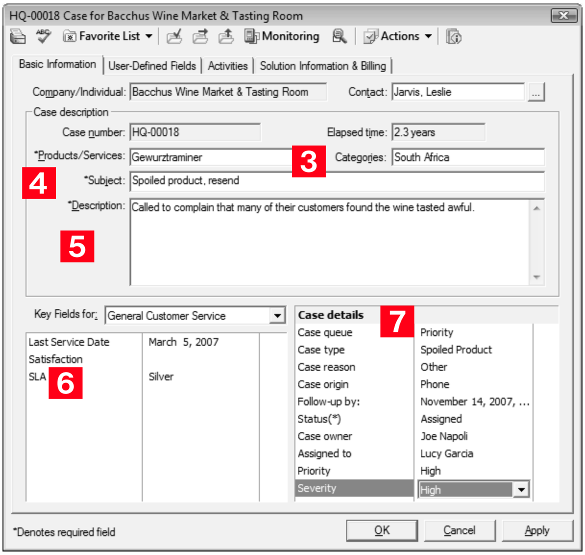
Click the Favorite List button to view the Favorite Lists for the Address Book entry associated with the case. This button also provides you with a way to quickly remove the entry from a Favorite list or add the entry to a Favorite List.

7 Fill in the remaining **Case details**.

Maximizer prompts you if you are missing mandatory information.

A Hotlist task, based on the follow-up deadline, is automatically created for the assigned user when a case is created. The task is automatically modified when the follow-up deadline or assigned user is modified. And when the case is resolved, the task is marked as complete.

The **Case Owner** is the person who is ultimately responsible for the closure of the case.



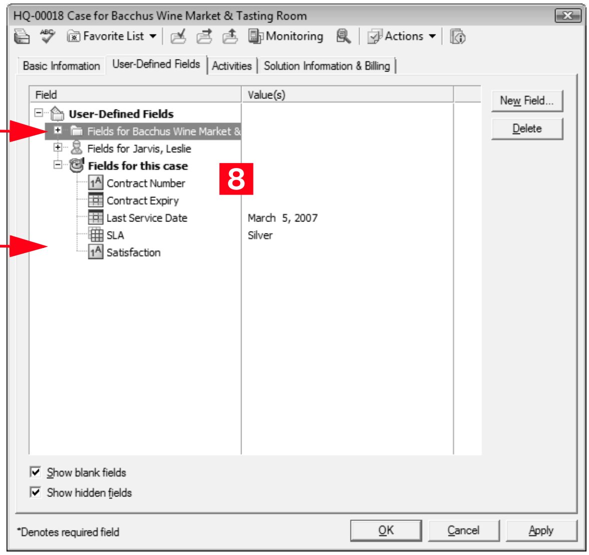
8 Select the **User-Defined Fields** tab. Assign values for the fields related to the case.

The User-defined fields tab contains Address Book user-defined fields in the **Fields for [Address Book entry]** folder and Customer Service user-defined fields in the **Fields for this case** folder.

If you cannot see one of the user-defined fields you need, click the **Show blank fields** checkbox to display all of the fields.

User-defined fields for an Address Book entry can belong to the Company/Individual or to the Contact.

Fields can be specific to cases as well. These fields are Customer Service type fields.



9 Click **Apply** to save the case.

Once the case has been resolved, the related information will appear in the **Solution Information & Billing** tab.

Note that several customer service merge fields can be included in the case resolution email templates (to customers). Specifically, the Solution Notes can be included by using the Case_Solution_Notes merge field and the related knowledge base article can be included by using the Case_Solution merge field. Email notification templates for customer service are set up in Administrator. For more information, see “Send Email to Customers and Users Regarding Case Status” on page 237 and “Default Customer Service Email Notification” on page 239.

Create Customer Service Cases from Email

You can create a customer service case related to an existing or new Address Book entry right from the Email window.

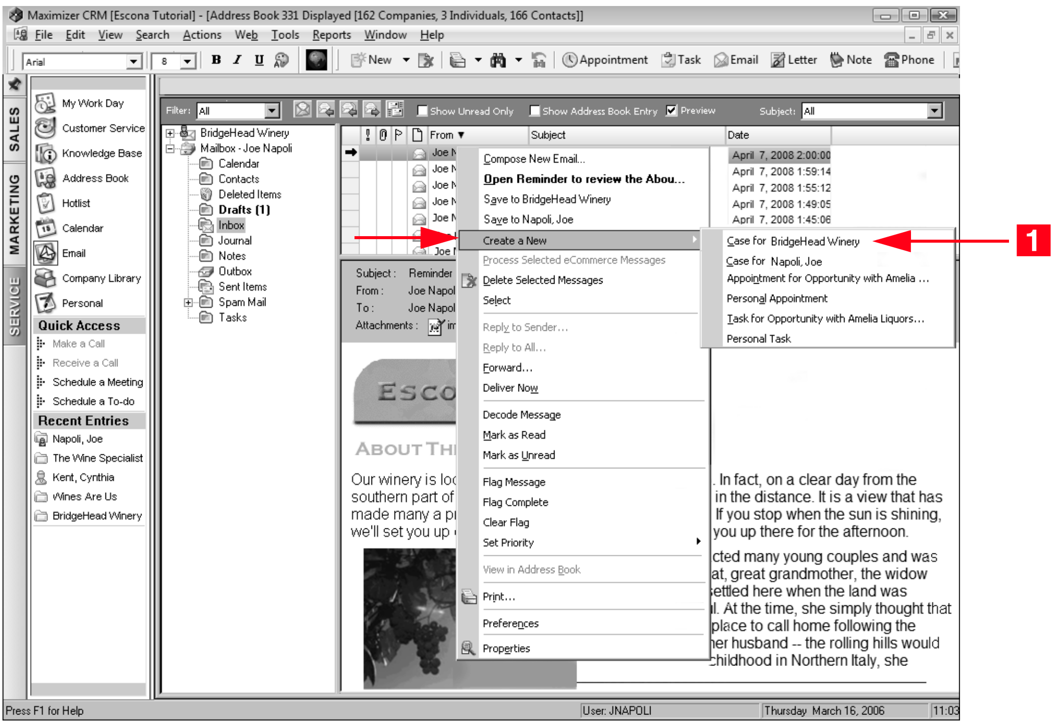
➤ To create a customer service case from an email message

Note that you must have the Customer Service window open before you can create a case from the Email window.

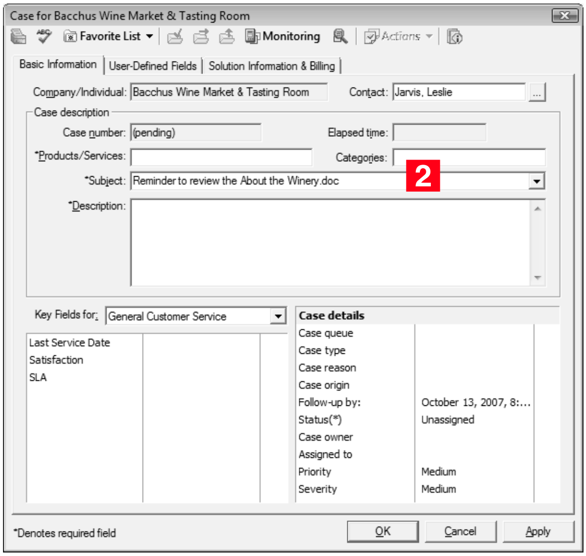
1 With the email message selected for which you are creating the case, right-click and select **Create a New > Case for [Address Book entry]**. There are two possible menu items that may appear—a menu item for creating a case for the selected Address Book entry in the controlling window and/or a menu item for creating a case based on the email address matching an email address in the Address Book.

If you drag and drop email to the Customer Service window icon, a document entry is created containing the information in the email message.

In the example graphic below, the Address Book entry BridgeHead Winery is selected in the Address Book window, and a menu item is available for creating a case for that entry. A second menu item appears because the selected email message has an email address that matches an email address in the Address Book. In the example graphic below, the email address of the selected email matches the Individual entry for Joe Napoli.



2 Fill in the case details. By default, the email subject becomes the case subject, the email body becomes the case description, and if the logged in user has a default case entry set up, those values are also filled in.



3 Click **OK** to close the case dialog box.

You can also create customer service cases from email in Outlook. See "Create Customer Service Cases from Outlook" on page 151 for details.

Assign Default Field Values to Customer Service Cases

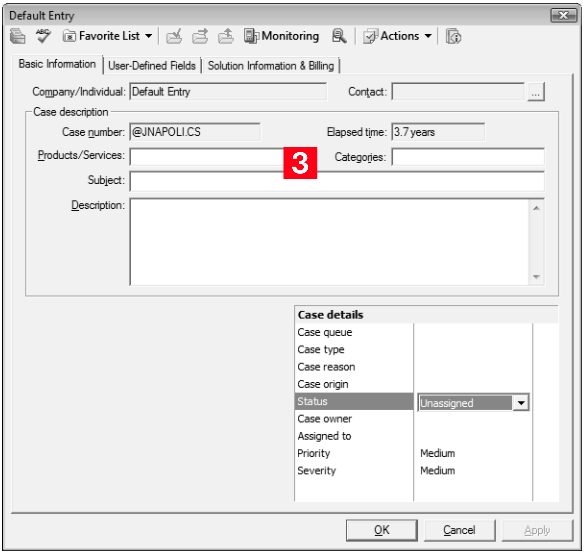
You can set up custom statuses for cases in Administrator in Customer Service preferences (File > Customer Service tab).

If you frequently assign or enter the same case values and want to save time by having those values pre-entered each time you create a case, you can define default field values in the Default Entry for customer service cases. The Company/Individual and Case number fields are automatically assigned when a case is created.

➤ To define defaults for customer service case fields

Default entries are user-specific so each user in the Address Book can have different default entries.

1. Open the **Customer Service** window.
2. Select **Edit** > **Default Entry**.
3. Enter the default values for any fields that you want to have pre-defined values when a new customer service case is created.



4. Click **OK** to save the Default Entry.

Modify Cases with Global Edits

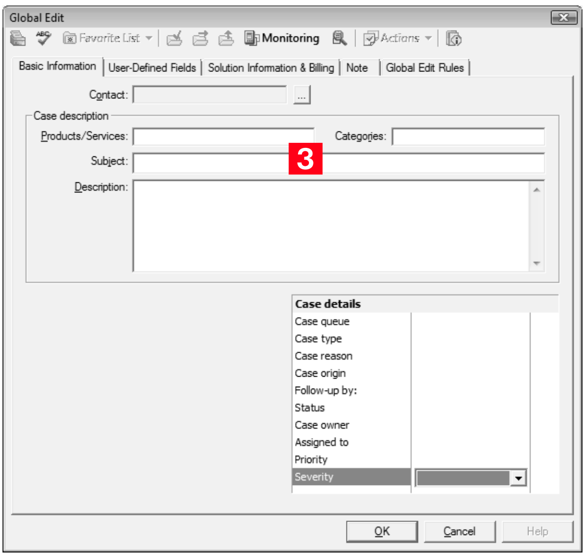
You can update a number of cases at the same time with the Global Edit command. For example, you may want to change the Case Queue of several entries at once. This feature is very powerful, so you might consider making a backup of your Address Book before making significant changes using Global Edit.

➤ To perform a global edit

1. In the Customer Service window, select the **entries** you want to modify.
2. Select **Global Edit** from the **Edit** menu. The Global Edit dialog box appears.
3. Apply your edits to the **Basic Information**, **User-Defined Fields, Note,** and **Solution Information & Billing** tabs. Changes made to these tabs are applied in the same way as when you are entering a new case although not all fields and buttons are available. The changes are applied to all cases included in the global edit. If you don't select any cases, the edits are applied to all your cases in the current list.

   You can also select **Remove** for many of the fields in the Basic Information tab. This option lets you remove existing values for a field without specifying alternative values.

For more detailed information, see F1 Help and Maximizer Help.



4. Click **OK** to apply the global edits.

Use Favorite Lists

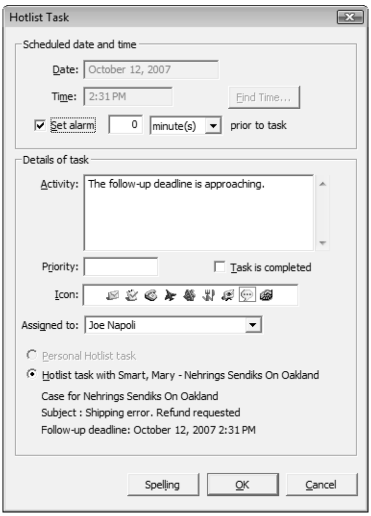
You can set up Favorite Lists in the Customer Service window to retrieve case lists you frequently use without having to search for the cases. See "Create Favorite Lists from Searches" on page 81 for more information. You can also refer to the F1 help in each of the Favorite List dialog boxes.

Case Hotlist Tasks

Case tasks are created regardless of Hotlist access rights.

A Hotlist task is automatically created when a user and a follow-up deadline are assigned to a case. When a case is assigned or escalated, a Hotlist task is created for the user to which the case has been assigned or escalated. The original user's task remains. If a case is assigned or escalated to yet another user, a task is created for that newly-assigned user and so on for each assigned user. When a case is resolved, the original task is automatically marked as complete.

The task date and time correspond with the case follow-up deadline. The assigned user, the associated Address Book entry, and the case subject are included as the task details.



Assigning or Escalating Cases

Cases should be assigned to the customer service team member who is best able to handle the type of issue. A customer service team member is categorized in Administrator as a customer service representative or a customer service manager, though a manager can serve both roles. Cases are assigned to representatives and escalated to managers when representatives are unable to resolve the cases.

Cases can be assigned and escalated as often as required.

When a case is assigned or escalated, you can type a message to record why the case was assigned or escalated. This message is then included in the logged note.

You can send email to the user who is now responsible for the case when you assign or escalate a case. The email message is system-generated and cannot be edited in Maximizer or Administrator. See “Default Customer Service Email Notification” on page 239 to see the information the message contains.

The customer also can be notified by email when a case is assigned or escalated so the customer always knows who is handling the case although the owner of the case is the person who is ultimately responsible for the closure of a case. If a Contact is associated with the case, the email message is sent to the Contact. Otherwise, the message is sent to the Company/Individual. See “Send Email to Customers and Users Regarding Case Status” on page 237 to create and assign customer notification email templates.

➤ To assign or escalate a case

1. Open the case.
2. Click **Assign** or **Escalate**.
3. In the Assign Case dialog box, select a user from the **Assign to** list.

   – or –

   In the Escalate Case dialog box, select a user from the **Escalate to** list.

   To be listed in this dialog box and to access the Customer Service window, users must be given sufficient rights using the Customer Service Manager or Customer Service Representative option in Administrator’s File > Users > [user ID] > Security tab.
4. Enter a **Note** about the case assignment or escalation.

   The Notes field is a good place to inform the newly assigned user why you are assigning the case to them, as well as any other information about the case that would be useful.

5. In the **Actions** box, select the corresponding option to notify the assigned user and/or case owner.
6. Click **OK** to close the dialog box.
7. Click **OK** again to close the case.

Resolving Cases

You can set up custom statuses for cases in Administrator in Customer Service preferences (File > Customer Service tab).

When you have solved a customer's issue, you "resolve" the case in the Customer Service window. You can document the details of how the case was resolved, add a new solution (if any) to the knowledge base, and notify the customer and user to whom the case is assigned. You can perform these tasks right in the Resolve Case dialog box.

There are two options you can choose from in resolving a case:

- **Solution involves information from an existing knowledge base article**

  Select this option if an existing knowledge base article resolved the case. Enter the knowledge base article number.
- **Create a draft knowledge base article from solution notes and link it to this case**

  Select this option if the case was resolved without the assistance of an existing knowledge base article. Type a concise, detailed explanation of how the case was resolved in the **Solution notes** text box.

  If the status is set to Abandoned, this option is unavailable.

See "Recording Case Solutions in the Knowledge Base" on page 240 to learn more about knowledge base articles.

You can send email to the user, the case owner, and the customer (associated Address Book entry) when you resolve a case. See "Default Customer Service Email Notification" on page 239 to see what information the email message contains.

➤ To resolve a case

1. Select the case and click the **Resolve** button in the View bar of the **Customer Service** window.

   – or –

   Open the case and click the **Resolve** button.
2. Select a **Billing type** from the drop-down list.
3. Enter the number of hours worked on the case in the **Billable time (hrs)** field.

4 Enter the hourly rate in the **Billing rate** field.

5 If Maximizer prompts you to update the Case fee automatically by multiplying the Billing rate by the Billable time, click either **Yes** or **No** to specify your preference. Otherwise, enter the **Case fee**.

Note that you can include this information in automated email templates for customers by using the Case_Solution_Note merge field.

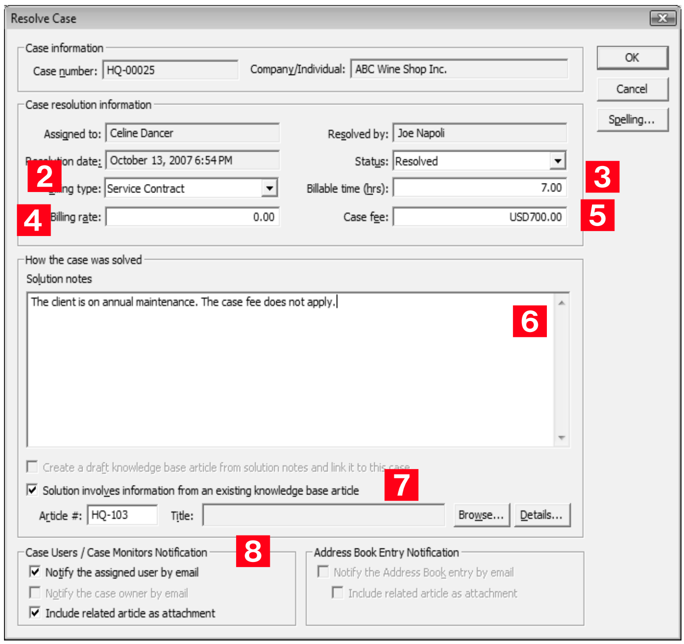
6 Enter the **Solution notes** for the case. These notes would include any specific information about how the case was resolved.

7 Select the **Solution involves information from an existing knowledge base article** option or the **Create a draft knowledge base article and link it to this case** option. If the case solution involves information from a previous knowledge base article, click **Browse** to search for the article. Once the article has been selected, click **Details** to view the related knowledge base article.

? For information about each of these options, click inside the dialog box and press F1.

8 If desired, select one or more of the options in the **notification** group boxes.

9 Click **OK** to close the Resolve Case dialog box.



Monitoring Cases

Depending on the volume of cases your organization generates, monitors could potentially receive hundreds of email message each week. Keep this in mind when allocating case monitors.

When a case is created, assigned, escalated, resolved, or deleted, or a case note is inserted or modified, email can be automatically sent to one or more users notifying them of the creation or change. These users might not be familiar with the case and might not even have access to the Customer Service window—any user in the Address Book can be a case "monitor".

A default list of monitors is set up in Administrator (File > Preferences > Customer Service tab) and automatically applies to *all* created and modified cases in the Address Book—users do not need to assign monitors on a per-case basis. However, if desired, and on a per-case basis, users can assign other monitors or disable case monitoring.

Whether or not the "Notify the assigned user by email" option is checked in the Assign, Escalate, or Resolve dialog box, an email message is sent to the default case monitors. These users also receive email each time a case note is inserted or modified.

The email message is system-generated and cannot be edited in Maximizer or Administrator. The email content sent to users is the same as the email content sent to case monitors. See "Default Customer Service Email Notification" on page 239 to view the email content.

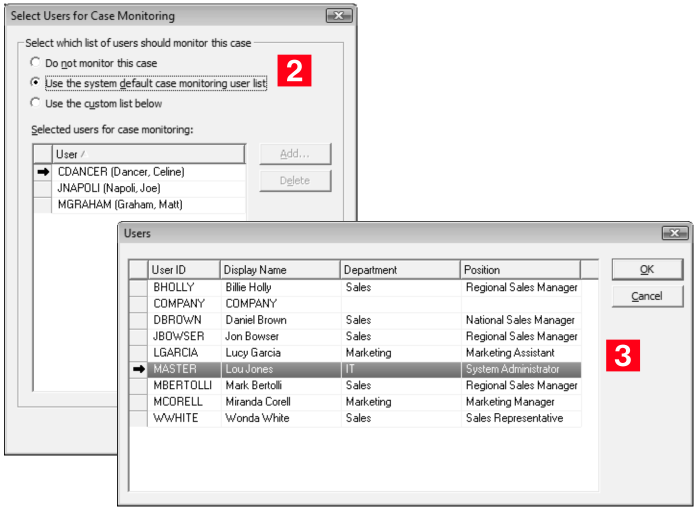
Following are the case monitoring choices available to each user for each case:

- **Do not monitor this case** – Removes users from the list so no user receives email regarding this case.
- **Use the system default case monitoring user list** – Displays the users specified in the system default case monitoring list. This list is created and edited using the Users button in Administrator's File > Preferences > Customer Service tab.
- **Use the custom list below** – Displays the users specified in the default case monitoring list and allows you to modify the user selection.

All users with case modification rights can add or remove monitors; case monitoring access rights are not separate from general case rights. If a particular user should not be modifying case monitors, all case modification rights can be removed in Administrator.

➤ To select a user for case monitoring

1. Select a case, right-click and select **Case Monitoring**.
2. Select one of the **case monitoring options**.
3. If you select to use a custom list for case monitoring, select the **case monitors** from the Users list.



Creating and Viewing Case Reports

You can create custom reports about specific customer service cases, or you can select from a variety of pre-defined reports.

Custom reports include the following:

- **Column Reports** – Use the current column setup in the active window.
- **Detailed Reports** – Allow you to select from a pre-defined list of report options from which you can create your report.
- **Note Reports** – Report on the notes associated with selected entries.

Pre-defined reports include reports on overdue, unassigned, and workload cases according to the queue, product, and/or customer service representative.

➤ To create a customer service case report

See "Setting Your Maximizer Preferences" on page 382 to learn more about printing Maximizer reports.

1. In the **Customer Service** window, create a list of entries to report on.

   If you would like to include all entries in your report, do not select any entries.

2. Select **Reports** > **Customer Service** and select a type of report from the menu.

Sending Automatic Email Notification about Cases

When a case is created, assigned, escalated, or resolved, an automated email message can be sent to the customer and any users notifying them of the case situation. Maximizer automatically inserts the basic case details in the message so you don't have to write the email message with case details each time. Case email notification allows you to effectively manage your customer service business processes.

Send Email to Customers and Users Regarding Case Status

Maximizer can automatically send email to customers, partners, and users when customer service cases are created, assigned, escalated, or resolved. To set up customer service email notification, you must create email notification templates through Administrator. You can create separate templates for each action (create, assign, escalate, or resolve). Each action can also have separate templates for sending email to customers/partners and users. Partners receive the same email notification as their associated customer if the "Carbon Copy the associated Partner when notifying Customers" option is selected. User notification email is sent to the user(s) identified in the Owner and Assigned To field for the case.

When writing the email templates, remember that each template applies to all customer service cases of that notification event type. They should be specific to the action they are assigned to but generic enough to apply to all cases with that action. Use merge fields to personalize email messages based on generic templates.

For MaxExchange Remote users, case email notification is not available.

For detailed information on how to create email templates for customer service case notification see the *Maximizer CRM Administrator's Guide*. Creation of the templates is done in the Administrator module.

Merge Fields

Merge fields in the email template personalize the message for each recipient by replacing the merge field code with the actual field value for that Address Book entry. For example, including the {First_Name?} merge field in an email template would replace that code with each email recipient's actual first name.

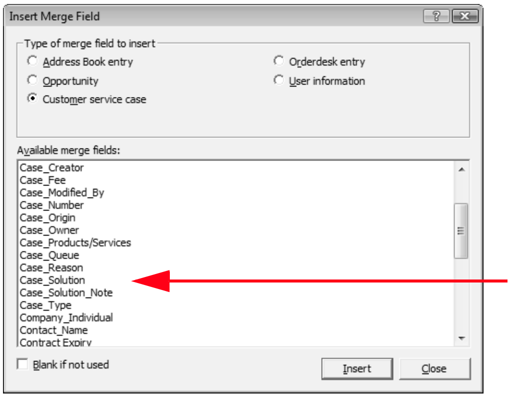
You can create templates in either .ETF (Maximizer Word Processor) or .HTML format. When creating templates in the Maximizer Word Processor, simply click the Merge Field button and select the merge field to insert into your email template. However, HTML templates are created in an HTML or text editor, which does not contain the Maximizer merge field selection dialog box. While you can manually

type the merge field codes into your HTML document, it's easier to first create the template in the Maximizer Word Processor and then copy the template (including the merge field codes) into an HTML template.

For a list of available merge fields to include in the email templates, see the Insert Merge Field dialog box in the Maximizer Word Processor. Press F1 when a field is selected to view its description.

Two merge fields that you are likely to use in a case resolution email message are Case_Solution and Case_Solution_Note:

- **Case_Solution** – This merge field includes the related knowledge base article number.
- **Case_Solution_Note** – This merge field includes any notes from the Solution Notes field in the Solution Information & Billing tab of the Case dialog box.



The Case_Solution field is the knowledge base article number related to the case and the Case_Solution_Note is the detailed note text from the Solution Notes of the case.

Following is a list of other merge fields that typically would be included in case notification email messages:

- **{My_Name?}** – The logged-in user's full name (first name, initial, and last name).
- **{My_Company?}** – The logged-in user's company name.
- **{CS.Case_Number?}** – The case number.
- **{CS.Client_Name?}** – The associated Address Book entry's name.
- **{CS.Contact_Name?}** – This field is not mandatory; therefore, a value may or may not be displayed in the message.

The question mark in a merge field is used to alert users to not leave a space if no value is assigned to the related Address Book entry for the merge field.

- **{CS.Subject?}** – The case subject.
- **{CS.Assigned_To?}** – For assignment or escalation email only.
- **{CS.Resolved_By?}** – For resolution email only.
- **{CS.Resolved_Date?}** – For resolution email only.
- **{CS.Resolved_Time?}** – For resolution email only.

Default Customer Service Email Notification

The “from” email address for this type of generic email is the same as the “from” address in the Email window (the current email profile).

Case monitors receive a generic email message containing the following basic fields each time a case is created, assigned, escalated, resolved, or deleted. These users also receive an email message each time a case note is modified. The message is system-generated and cannot be edited in Maximizer or Administrator.

Note that this type of generic email is also sent to users if customer service email notification templates for users have not been defined in Administrator. Customers do not receive any email message if a template has not been defined.

The basic fields used in a generic email message include the following:

Case number – <case number>

Case subject – <case subject>

Case description – <case description>

Case_Solution_Notes – <solution notes>

Company – <Company/Individual name>

Contact – <Contact name>

Assigned to – <user ID> <user name>

Case Owner – <case owner>

Case has been modified by – <user ID> <user name>

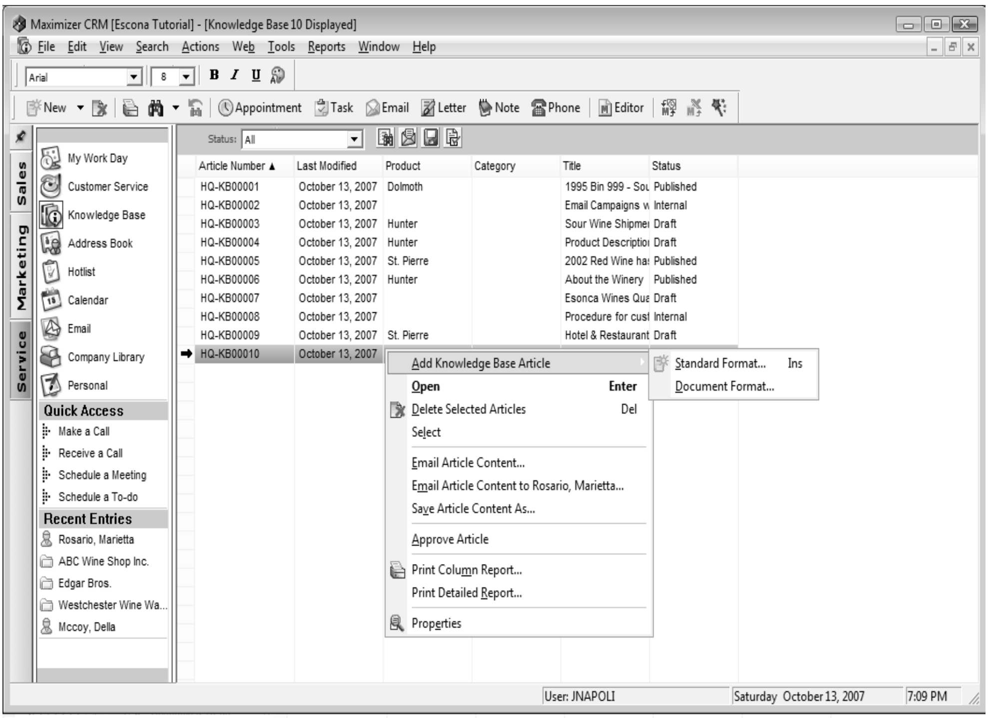
Case changes – <any change in the case e.g., case status has been changed to resolved>

Recording Case Solutions in the Knowledge Base

The Knowledge Base window provides you with a library-style tool to manage your customer service solutions; the window is tightly integrated with the Customer Service window. An article is typically created for each case solution, answered question, or guideline relating to your products or services.

While working in the Knowledge Base window, keep the following points in mind:

- Find articles using the **Search** button.
- Article **numbers** are automatically generated by Maximizer.
- An article's **status** determines who can view the article.
- Right-click in the Knowledge Base window to access frequently-used menu items.



Articles can be added in two formats: standard (text) or document (file attachment).

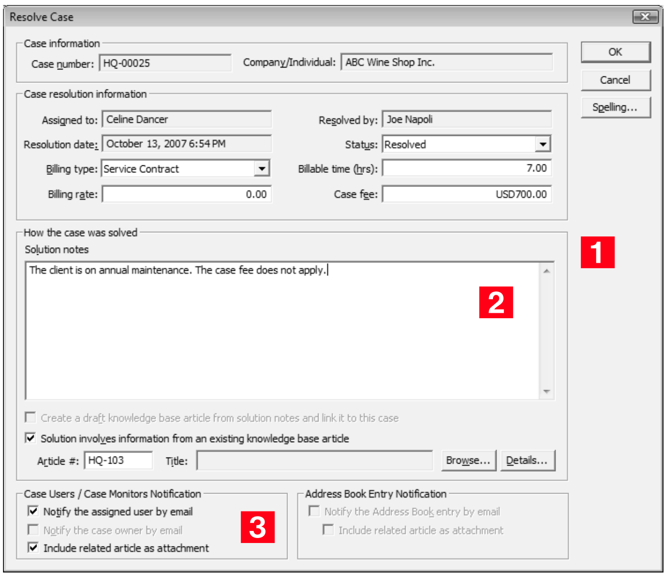
The Knowledge Base window displays articles according to number, last modified date, product, category, title, and status. Click on a column heading to sort the articles by the column subject matter. To pop up a convenient list of commands to manage articles, click your right mouse button.

Record Case Solutions

When you resolve a customer service case, you can type an explanation of how the case was resolved and jot down keywords that best identify the article content. Or, if an existing knowledge base article was used to solve the case, you can assign the article number to the case.

➤ To record a case solution

1. If an existing article helped resolve the case, select it in the **Knowledge Base** window or make a note of the number before resolving the case.
2. If a **new method** helped resolve the case, type in an explanation.
3. Choose to **notify** the assigned user, case owner, or associated Address Book entry of the case status by email. Even when these options are deselected, case monitors receive email.



A newly created article is assigned a draft status until it is opened and assigned a different status by the appropriate users. Articles can also have a status of internal, published, or expired. The status determines who can read or modify the article. See “Control Who Can Access Articles” on page 243 for more information.

Add Articles to the Knowledge Base

In a similar way to the Company Library, the Knowledge Base window provides a location for general customer service collateral. So articles do not always need to be associated with a specific case.

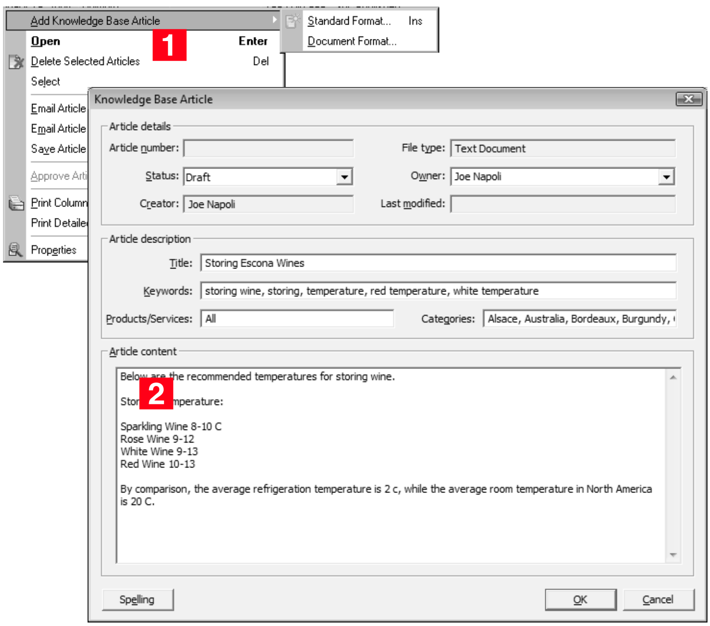
There are two ways to add an article that is not associated with a case: using the standard (text) format and the document (file attachment) format. If the article content is short and straightforward, the former option should suffice. However, if you want to carefully compose the article over a day or two, confirm data with an external source, or run a spell check, you may wish to write the document in Microsoft Word, for example, and then attach the article as a document. When attaching the file, you can browse to any folder on your computer or network to which you have access.

➤ To add a knowledge base article

1. Right-click and select **Add Knowledge Base Article**. Select Standard Format or Document Format.

For information on selecting products/services and categories, see Maximizer Help.

2. If you select the **Standard** format, you type your article text in the **Article content** text box. If you choose the **Document** format, you must browse and select an existing file.



Control Who Can Access Articles

A newly created article is assigned a draft status until it is opened and assigned a different status by the appropriate users. Articles can also have a status of draft, internal, published, or expired. The status determines which users can read or modify articles:

- **Draft** articles can be viewed and modified by creators, owners (users or security groups), and approvers.
- **Internal** articles can be viewed by all users who have knowledge base read rights, excluding external Maximizer web access users (customers and partners).
- **Published** articles can be viewed by all users who have knowledge base read rights, including external Maximizer web access users (customers and partners), and modified by approvers.
- **Expired** articles can be viewed and modified by creators, owners (users or security groups), and approvers.

The knowledge base ensures that valuable case solutions are recorded, reviewed for quality assurance, and made available to the appropriate users.

Save and Send Articles

Any article can be saved or sent by email. However, due to a file naming convention, an article title containing the following characters cannot be saved or sent by email:

? / * : " | \ < >

If you want to save or send the contents of an article that contain these characters in the file name or article title, Maximizer automatically replaces them with underscores so the file can be saved or sent by email.

Find Articles

You can search the Address Book's knowledge base for any article that matches the basic article fields you specify, such as creator, owner, and last modification date. To find all articles, leave all the fields blank.

The Search by Phrase option searches the article title and keywords and can be fine-tuned using the following options:

- **Article contains all of the words in phrase** – Searches for *every* word you specify.
- **Article contains the exact phrase** – Searches for the words in the exact order you specify.

- **Article contains at least one of the words in phrase** – Searches for at least one of the words you specify.

You can choose to search the article content, as well as the title and keywords, using the "Include article body contents when executing search" option. Once selected, the three search options just described apply to the article content, as well as to the title and keywords.

If you are running Maximizer on a SQL server, the Full-Text Search engine must be installed in order to search article content. If this option is grayed out, contact your system administrator or see the *Maximizer CRM Administrator's Guide* for information on how to enable the full-text search in SQL.

While any file format can be attached as an article, the content of only the following file formats can be searched:

- Microsoft Word (*.doc)
- Microsoft Excel (*.xls)
- Microsoft PowerPoint (*.ppt)
- Text (*.txt)
- HTML (*.htm)

CHAPTER 8

Accessing Maximizer on the Web

Use Maximizer Around the Globe

In this chapter...

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"Maximizer Web Access" on page 247

"Searching for Entries in Maximizer Web Access" on page 251

"Working with Lists of Entries" on page 260

"Working with Address Book Entries" on page 266

"Sending and Receiving Email" on page 278

"Working with Your Hotlist" on page 286

"Working with Your Calendar" on page 289

"Working with Action Plans" on page 294

"Viewing, Modifying, and Adding Notes" on page 296

"Viewing and Modifying User-Defined Fields" on page 299

"Working with Documents" on page 303

"Working with Opportunities" on page 309

"Working with Campaigns" on page 316

"Working with Customer Service Cases" on page 319

"Working with the Knowledge Base" on page 325

"Setting Personal Preferences in Maximizer Web Access" on page 329

"Viewing Company Information" on page 331

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Maximizer on the Web

For many organizations, it's impractical to send an entire database to each remote machine—the database may be too large; there may be concerns about distributing valuable lead and customer information; or there may be a concern about connection times and the amount of data being sent.

Maximizer's web access sites give remote users access to the central Maximizer database via the web. Remote users can access and work with Address Book entries as they would in Maximizer at the office.

Remote users need only a web browser, Maximizer user ID, and password. A travelling business person could step into a web café or borrow someone's computer to quickly connect to the home office Address Book. Once online, it's easy to work with contact data, check Hotlist tasks and calendar appointments, customer service cases, and opportunities.

The web access sites provide Maximizer database access to people who don't have Maximizer installed. A company could have its distributor list in Maximizer and allow web access to that list so any other member of the channel—with the proper password—could go online and browse the distributor directory.

Maximizer on the Web has four components—Maximizer Web Access, Wireless Access, Partner Access, and Customer Access. Another site is provided to interface a Maximizer eStore with a specific Address Book.

Maximizer Web Access

You can access the sample Escona Tutorial Address Book using “jnapoli” as the user ID and “maximizer” as the password.

If you are using Microsoft Internet Explorer 7.0, you should not run Maximizer Web Access in multiple tabs at the same time.

You can access Maximizer Web Access through the Start menu or by entering its URL in a browser.

➤ To access Maximizer Web Access

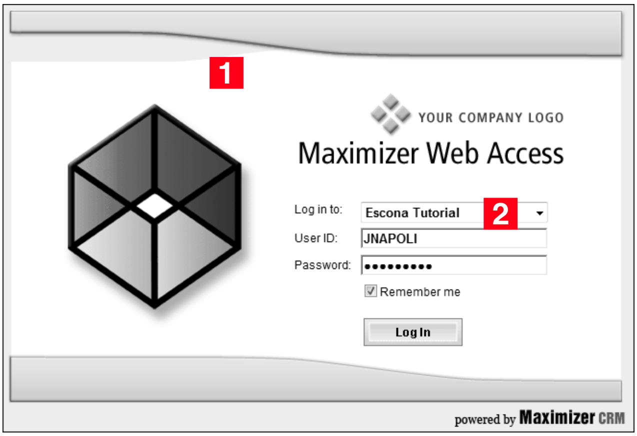
1. To access Maximizer Web Access through its URL, enter the **URL** in any web browser. The URL is set by your system administrator. Typically, the URL would look like the following:

   http://[YourServerName]/MaximizerWebAccess/Default.aspx

   – or –

   To access the site through the Start menu, select **Start > Programs > Maximizer CRM > Web Access > Maximizer Web Access**.

2. Select the **Address Book** you want to open, and enter your **User ID** and **password**.



Navigation Tips

1 Because Maximizer Web Access runs inside your browser, you navigate its pages the same way you navigate a website. To move back a page, click the **Back** button on your browser's toolbar. Click the **Forward** button on the browser's toolbar to move forward. (On the keyboard, you can move backwards and forwards by pressing Alt + left or right arrow key.)

2 The page controls at the top and the bottom of a page allow you to choose the number of entries displayed on a page and to navigate from page to page. Click on a **page number** to change to a different page. The **arrow** buttons take you to the next and previous pages, as well as to the first and last page. The **ellipsis** buttons take you to the next and previous 10 pages.

3 Use the **icons** to access the main windows in the site. The tabs along the side of the icon bar represent the various modules. Depending on what tab you have selected, the icons change.

4 Click the **plus sign** to expand the sections for the **Maximizer Modules**, **Administration**, **Options**, **Quick Search**, **Recent Entries**, **Phone List**, and **Links**.

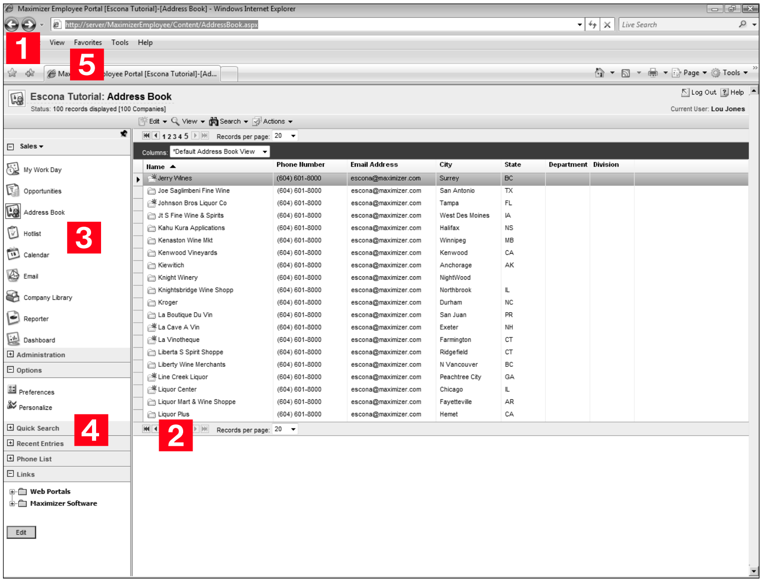
Note that preferences for the Maximizer Modules, Quick Access commands, and Recent Entries are set up in the Maximizer icon bar properties. See "My Work Day View" on page 27 for more information.

If you log in as the MASTER user, the Administration section is always visible.

Note also that the visibility of the Administration section is determined by user access rights. If the user has Administrator, but not UDF setup rights, only the Maximizer Web Access Administrator link is displayed in the Administration section. If the user has UDF setup rights, but not Administrator rights, only the Set Up User-Defined Fields link is displayed. If the user has neither Administrator nor UDF setup rights, the Administration section is not displayed at all.

5 If you repeatedly run Maximizer Web Access from the same computer, create a Favorite or Bookmark to the Login page so you never have to re-enter the URL by doing the following:

- In Internet Explorer, select **Favorites > Add to Favorites**.



Maximizer Web Access Main Pages

To move from one main page of the site to another, use the icons in the icon bar. You can also use your browser's Back button to move to the previous page you had open.

Maximizer Web Access allows you to access your company information on the web. Most of the tasks you would perform in Maximizer can be done in Maximizer Web Access.

Use the My Work Day Page

The My Work Day page is the overview page for Maximizer Web Access. Use the My Work Day page to see the day's tasks, appointments, and your company announcements. This page works the same way it does in Maximizer. For more information, see "My Work Day View" on page 27.

You can customize the My Work Day page in your preferences. In the Options section, select Preferences and select the Overview Page tab. For more information, see the Maximizer help.

➤ To use the My Work Day Page

1. Use the **icons** to access the main windows in the site. The tabs along the side of the icon bar represent the various modules. Depending on what tab you have selected, the icons change. You can minimize the size of the icon bar by clicking on the **pin**

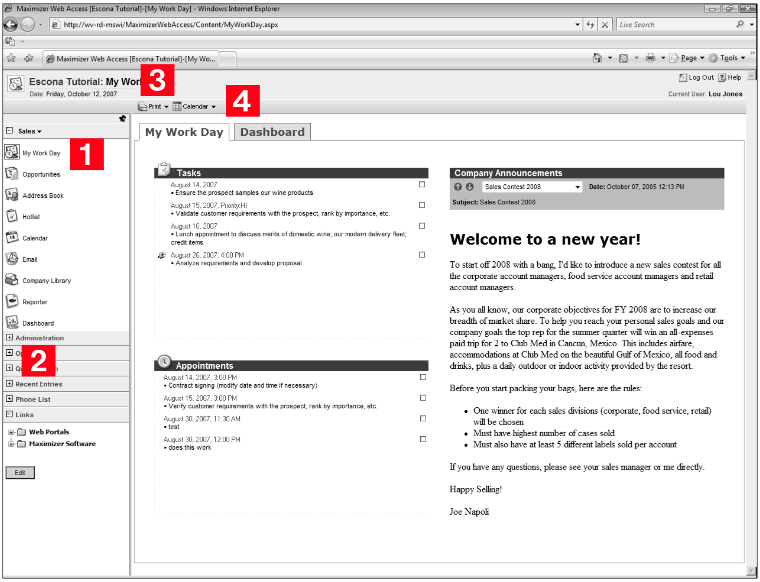
graphic. When the icon bar is minimized, click on the button below the pin graphic to switch to another module.

The visibility of the Administration section and its links (Maximizer Web Access Administrator and Set Up User-Defined Fields) is determined by user access rights.

2 Click the **plus sign** to expand the sections for **Maximizer Modules**, **Administration**, **Options**, **Quick Search**, **Recent Entries**, **Phone List**, and **Links**.

3 Use the **Print** button to print tasks, appointments, activities, and company announcements for the day.

4 To switch to another calendar day in the My Work Day view, click the **Calendar** button.



Searching for Entries in Maximizer Web Access

Encrypted user-defined fields are not searchable through Maximizer Web Access.

In all of the main Maximizer Web Access pages, you can search by various criteria.

Search for Address Book Entries

There are a few different ways to search for Address Book entries. You can use the Search and Advanced search options in the Quick Search section of the navigation pane or use the Search menu. The "regular" Search option provides you a quick way to find specific information using basic information for entries such as first name. For a more advanced search, you can use the Advanced option to do a search by all fields. You can also choose one of the several options available on the Search menu.

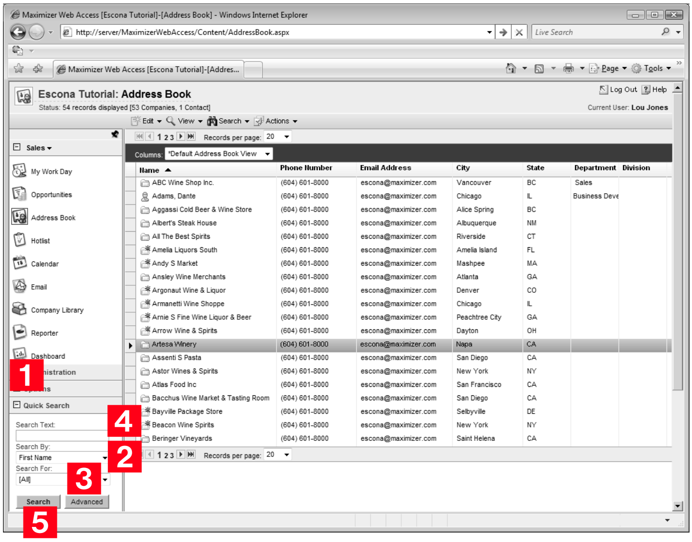
The default number of Address Book entries displayed after a search is 500. Select the Personalize link in the Options section to change this setting.

➤ To search using the Quick Search regular Search option

1. In the Address Book page, click the **plus sign** to expand the Quick Search section.
2. Select the basic information by which you would like to search in the **Search By** drop-down list. You can search by first or last name, phone number, or company name.
3. Select the type of entry for which you are searching in the **Search For** drop-down list. You can search for Companies, Individuals, and Contacts. The Person option searches both Individuals and Contacts. Or, you can search all entries in the Address Book.
4. Depending on what you are searching for, enter the exact first/last name of the Company, Contact, or Individual or the phone number in the Search Text field. You can also enter just the first few letters of the name. An example of this would be to enter "hen" for Henderson Ltd., or "h" to see all entries beginning with the letter "h".

Depending on the speed of your Internet connection, a broad search of your Address Book may take a long time to display. So if you are looking for Henderson Ltd., for example, do an Exact Match search on "Henderson Ltd.", rather than searching on "h" or "he".

5 Click the **Search** button when you have selected your search criteria.



➤ To search using the Quick Search Advanced option

1 In the Address Book page, click the **plus** sign to expand the Quick Search section.

2 Click **Advanced**. The Search by All Fields dialog box appears.

3 In the **Search by All Fields** dialog box, click **Add**.

4 In the **Select Fields for Search** dialog box, select one or more fields and click **OK**.

5 In the Values for Search dialog box, select one or more **values** and click **OK**. For each field you have chosen for the previous step, you will be prompted to specify the values. Use the search condition options to further narrow your search.

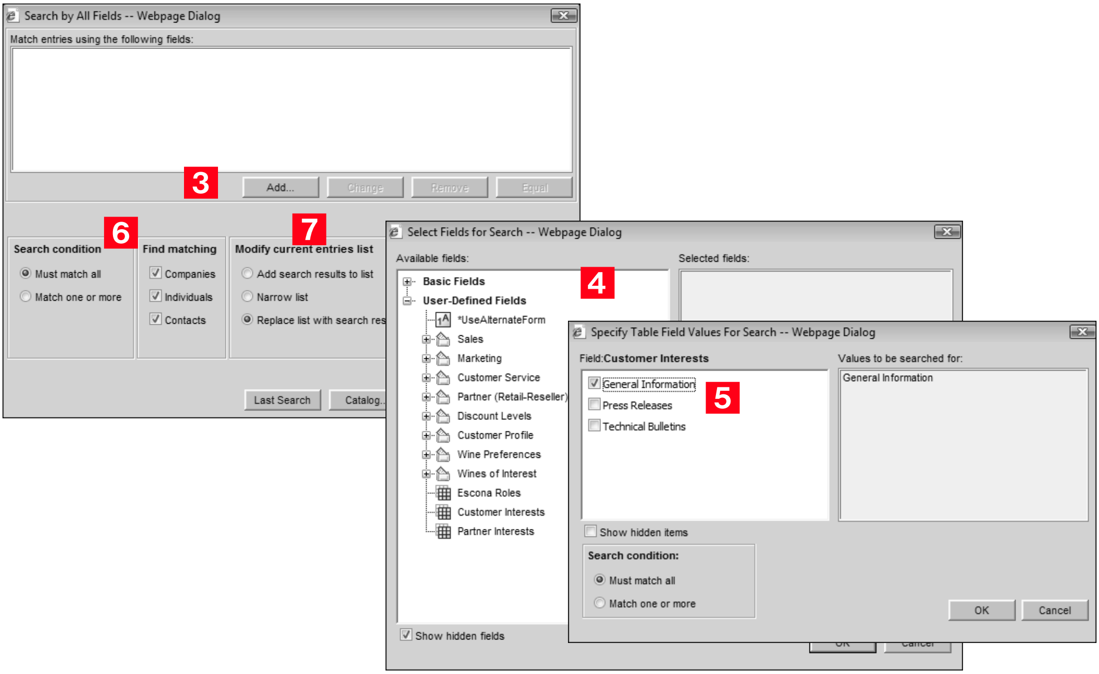
6 Specify the remaining **search criteria** in the Search by All Fields dialog box.

If you wish to build a list of entries that excludes a certain group, as in a list of all Address Book entries except those in a certain state or province, use the Not Equal button.

7 The matching entries in the Address Book will replace the current Address Book entry list. Select an option according to how you would like the current list to be updated. You can choose to further narrow the search by specifying options to include or omit sales leads.

ⓘ Use the Last Search button to perform previously defined searches.

8 Click **OK** to begin the search.



➤ To search using the Search menu options

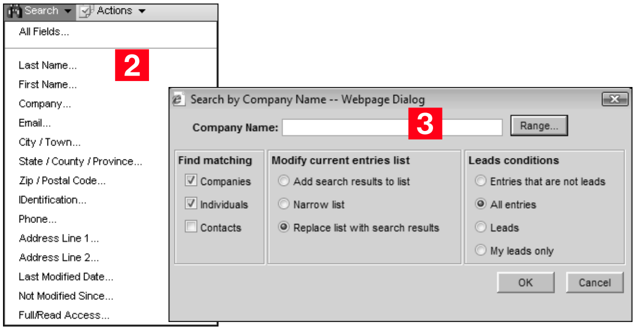
If you are searching by all fields, follow the Advanced Search instructions.

1 In the Address Book page, click the **Search** button. A list of searching options appears.

2 Select the **field** by which you would like to search.

3 In the Search By dialog box, select the **types** of entries you want to retrieve. If you are searching for a specific entry, enter the exact text for which you are searching. If you leave the main search text blank, all entries are retrieved. For example, if you

search by Company Name and leave the field blank, all Companies in the Address Book are retrieved.

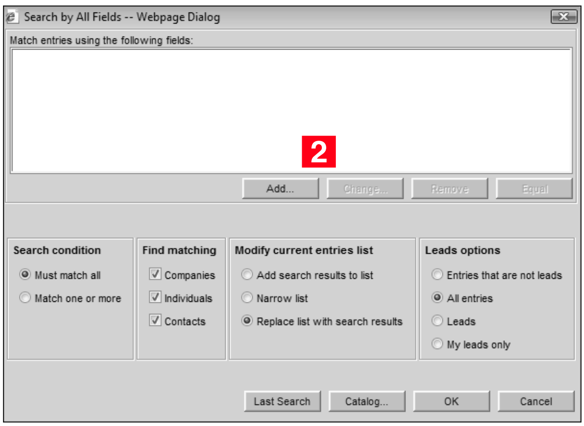


Search by All Fields

Some searches, such as the Search by All Fields, are common to all of the main pages of Maximizer Web Access. This type of search is useful when you need to search by fields that are not listed in the Search menu or when you want to search by more than one field. In the Search by All Fields dialog box, you can build complex search arguments and even save your search in the catalog for later use.

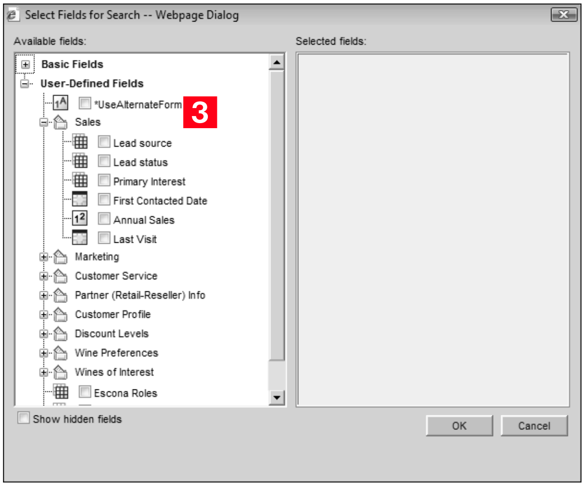
➤ To search by all fields

1. In the Address Book, Opportunities, or Customer Service page, select **Search > All Fields**.
2. In the **Search by All Fields** dialog box, click **Add**.

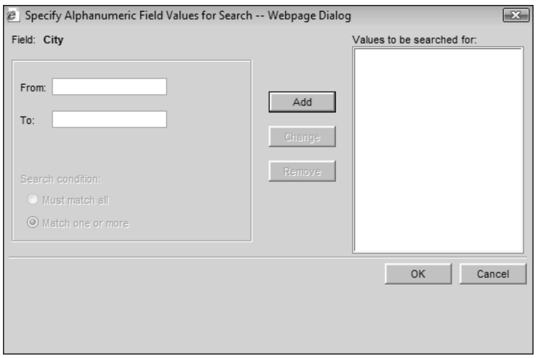


In order to be able to select more than one field when using the All Fields search, you must have the Allow multi-selection in the Search by All Fields option enabled in the Personal Preferences. (Click the Personalize link in the Options section.) This option is off by default.

3 In the **Select Fields for Search** dialog box, select one or more fields and click **OK**.



4 In the **Specify Field Values for Search** dialog box, select one or more values, click **Add**, and then click **OK**.



For each field you have chosen from the previous step, you will be prompted to specify the values. Use the search condition options to further narrow your search.

5 Specify the remaining search criteria in the Search by All Fields dialog box.

To retrieve all Address Book entries that do not have email addresses, do a search by all fields, choose the email field, leave the search range blank, and then click the Not Equal button.

If you wish to build a list of entries that excludes a certain group, as in a list of all Address Book entries except those in a certain state or province, use the **Not Equal** button.

To set the maximum number of entries returned in a search, click the Personalize link in the Options section.

6. In the **Modify current entries list** group box, select one of the options.
   - **Add search results to list** displays the entries that match your search criteria, without removing any currently displayed entries from the list.
   - **Narrow list** searches only selected entries (or all currently displayed entries if none are selected), and removes any entries that do not match your search criteria.
   - **Replace list with search results** removes all entries currently displayed in the list and replaces them with entries that match your search criteria.

For information on saving searches, see Maximizer Web Access Help. Also see "To save your search to the search catalog" on page 80.

7. For Address Book entries, you can choose to further narrow the search by specifying options to include or omit sales leads.
8. Use **Last Search** and **Catalog** for previously defined searches.
9. Click **OK** to start the search.

Search for Basic Fields

There are a number of basic fields you can search for in the Address Book, Opportunities, and Customer Service pages. In the following example, an opportunity field is the search field. Similarly, you can search by some basic fields in the Company Library such as the author or file name of a document.

➤ To search for a basic field

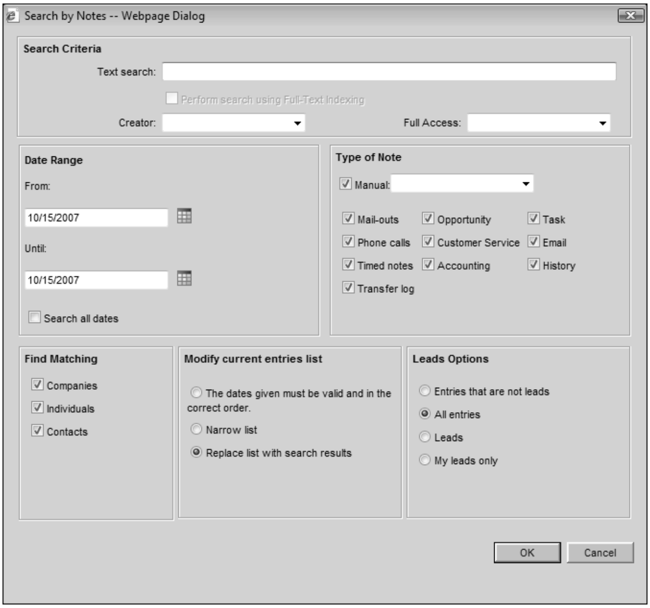
1. Open the Address Book, Opportunities, or Customer Service page.
2. Click the **Search** menu, and select the search field.

   The search dialog box opens.

3. Specify your search criteria and click **OK** to start the search.

Search for Entries by Notes

You can search for entries that have notes matching search criteria you specify. This example pertains to searching for Address Book entries.



➤ To search for entries by notes

1. Open the Address Book, Opportunities, or Customer Service page.

2. Click the **Search** menu, and select **Notes**.

   The Search by Notes dialog box opens.

3. Specify your search criteria in the **Search Criteria**, **Date Range**, **Type of Note**, and other group boxes, as needed.

   - To search for entries with notes that contain a specific word or phrase, type the word or phrase in the **Text search** field.

     If your system administrator has enabled full-text search, the **Perform search using Full-Text Indexing** checkbox will be available. This option provides faster, and often more accurate, results. For more information, refer to the *Maximizer CRM Administrator's Guide* or your system administrator.

   - To search for entries with notes created by a specific user, select the user's name from the **Creator** drop-down list.

- To search for entries with notes that are accessible by a specific user or security group, select the name of the user or group from the **Full Access** drop-down list.
- To search for entries with notes that were created within a specific date range, enter the date range in the **From** and **Until** fields. Or select **Search all dates**.
- To search for entries with notes of a specific type, select the type(s) to search for in the **Type of Note** group box.

4 To search for a specific type of Address Book entry, select the type(s) to search for in the **Find Matching** group box. To search for Address Book entries that are not leads, entries that are leads, all entries, or your own leads, select the applicable option in the **Leads Options** group box.

To search for an opportunity or a case with a specific status, select the status in the **Find Matching** group box.

5 In the **Modify current entries list** group box, select one of the options.

- **Add search results to list** displays the entries that match your search criteria, without removing any currently displayed entries from the list.
- **Narrow list** searches only selected entries (or all currently displayed entries if none are selected), and removes any entries that do not match your search criteria.
- **Replace list with search results** removes all entries currently displayed in the list and replaces them with entries that match your search criteria.

Search for Entries by Documents

If your system administrator has enabled full-text search, you can search for entries that have documents matching the search criteria you specify. For more information about full-text search, refer to the *Maximizer CRM Administrator's Guide* or your system administrator.

You can search by the following types of documents: .doc, .xls, .ppt, .txt, and .htm. You may also be able to search by .rtf, .xml, .pdf, and other document types, depending on which document types your system administrator has configured for full-text search.

➤ To search for entries by documents

1. Open the Address Book, Opportunities, or Customer Service page.

2. Click the **Search** menu, and select **Documents**.

   The Search by Documents dialog box opens.

3. Specify your search criteria in the **Search Options**, **Date Range**, and **Size** group boxes, as needed.

   - To search for entries with documents that contain a specific word or phrase, type the word or phrase in the **Text in document** field.
   - To search for entries with documents that have a specific name, type the beginning of the name of the document in the **Name of document** field. The search will look for document names that begin with the characters entered.
   - To search for entries with documents of a specific category, select the category from the **Category** drop-down list.
   - To search for entries with documents created by a specific user, select the user's name from the **Creator** drop-down list.
   - To search for entries with documents that are accessible by a specific user or security group, select the name of the user or group from the **Owner** drop-down list.
   - To search for entries with documents that were created within a specific date range, enter the date range in the **From** and **Until** fields. Or, select **Search all dates**.
   - To search for entries with documents that exceed a given file size, enter the minimum number of kilobytes in the **Documents larger than** field.

4. To search for a specific type of Address Book entry, select the type(s) to search for in the **Find Matching** group box.

5. In the **Modify current entries list** group box, select one of the options.

   - **Add search results to list** displays the entries that match your search criteria, without removing any currently displayed entries from the list.
   - **Narrow list** searches only selected entries (or all currently displayed entries if none are selected), and removes any entries that do not match your search criteria.
   - **Replace list with search results** removes all entries currently displayed in the list and replaces them with entries that match your search criteria.

Working with Lists of Entries

You can use the same commands to work with most types of entries in Maximizer Web Access.

There are a number of ways to select entries in Maximizer Web Access.

➤ To select or clear entries in a list

- Click the gray box to the left of entries.
- To select multiple entries, click on the entries one at a time.
- To select all entries, select **Edit > Select All in Current Page**. Or click the gray box in the upper-left corner of the list.

- To clear selected entries, select **Edit > Deselect All**.
- To reverse which entries in the list are selected, select **Edit > Invert Selection in Current Page**.

Display Entries in a List

After you have performed a search, you will most likely want to perform some action on the entries or a subset of the entries. There are a couple of ways to display and remove entries in a list.

➤ To display only selected entries

1. Select the entries that you want to display.
2. On the **Edit** menu, select **Make Selected List Current**. The other entries are removed from the page.

➤ To remove all entries in a list

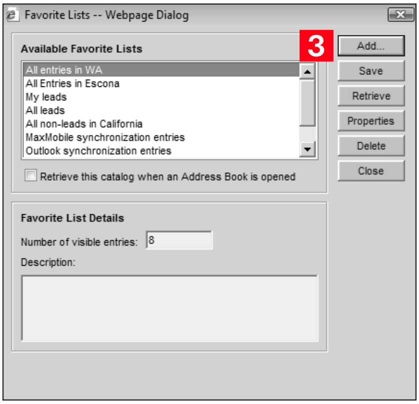
- In the Address Book, Opportunities, Customer Service, or Knowledge Base pages, select **View > Clear List**.

Work with Favorite Lists

After you have performed a search in the Address Book or Customer Service page, you can easily create a Favorite List.

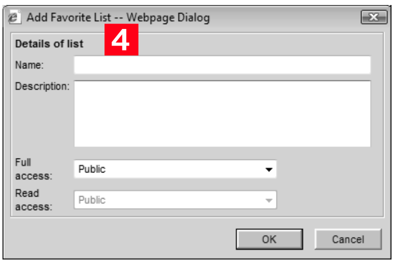
➤ To create a Favorite List

1. If necessary, perform a search to retrieve the entries you want to add to a new Favorite List.
2. Select **View > Favorite Lists.**
3. Click **Add**.



For information on entering details, refer to "Create Favorite Lists from Searches" on page 81.

4. Enter the details for the Favorite List and click **OK** to save the Favorite List.



5. If you created a Favorite List of Address Book entries that you want to appear by default in the Choose an Address Book List dialog box (in the View Favorite List drop-down list), select the **Retrieve this list when an Address Book is opened** option. This Favorite List will also display automatically when you open Maximizer.
6. Click **Close** to close the Favorite List dialog box.

➤ To retrieve a Favorite List

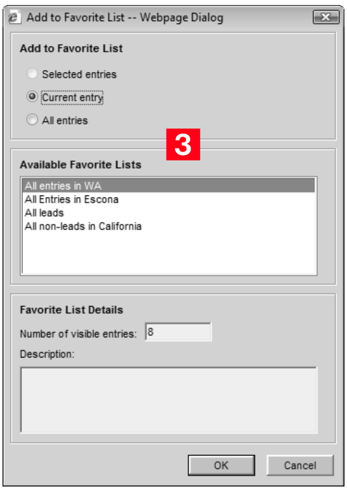
- Select **View > Favorite Lists**. Select the Favorite List you want to view, and click **Retrieve**.

➤ To add or remove entries in a Favorite List

1. Select the entries to add to or remove from the Favorite List. Or open an entry.
2. Select **View > Add to Favorite List** or **Remove From Favorite List**.

   – or –

   If the entry is open, select **Favorite List > Add to Favorite List** or **Remove From Favorite List**.
3. Select the Favorite List and specify the details as to what entries you are adding or removing. For example, if you would like to use only the selected entries in the current Address Book list, select **Selected Entries**.



➤ To view a list of Favorite Lists for an entry

1. Open the entry.
2. Select **Favorite List > View Favorite Lists**.

   The View Favorite Lists dialog box opens listing all the Favorite Lists that the current entry belongs to.

Use Column Setups to Organize Lists

Just as in Maximizer, Maximizer Web Access has a selection of column setups you can use for the main pages, including the Address Book, Opportunities, Campaigns, Customer Service, and Hotlist pages. You can also create your own column setups to display different fields in various combinations.

➤ To create a column setup

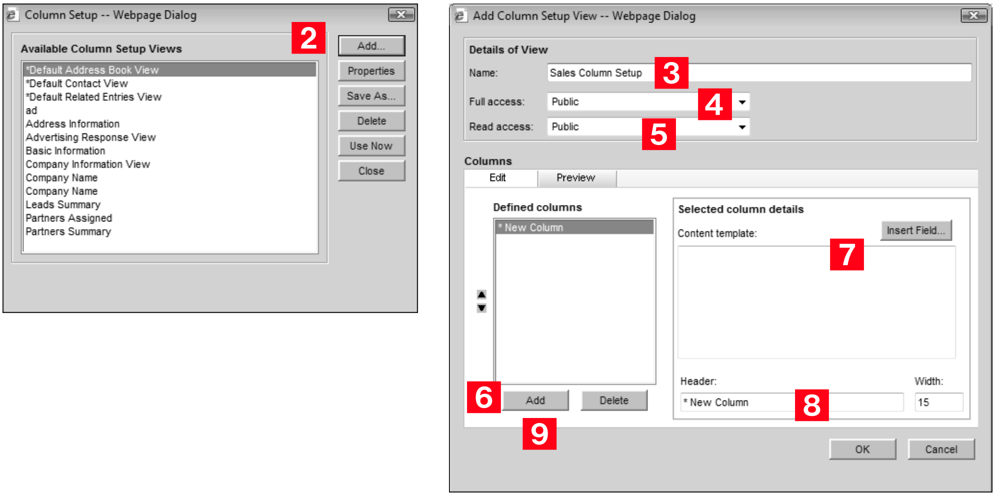
1. Select **Column Setup** from the **View** menu.
2. In the **Column Setup** dialog box, click **Add**.
3. Type a **Name** in the **Details of View** group box.
4. Select an option from the **Full Access** drop-down list.

   If you leave **Public** selected, all users can modify or delete the column setup. If you select a group or user, only members of that group or that particular user can perform these actions.
5. Select an option from the **Read Access** drop-down list.

   If you leave **Public** selected, all users can see and use the column setup. If you select a group or user, only members of that group or that particular user can see and use the column setup.
6. Click **Add** on the **Edit** tab. **New Column** appears in the Defined columns list and the **Insert Field** button is enabled.
7. Click **Insert Field**, select a field in the **Available Fields** list to include in the column setup, and click **OK**. The field appears in the Selected Column Details list.
8. If necessary, adjust the **Header** (field name) and **Width** of the column.
9. Click **Add** again. The field you inserted in the Selected column details list is added to the Defined columns list.
10. To add your next column, make sure the **New Column** item is selected and click **Insert Field**. To add another field to the same column, select the previous field you added and click **Insert Field**.

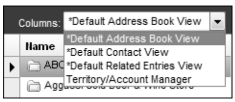
Click the Preview tab to preview your column setup. Note you will be prompted to save the column setup before you can preview it.

11 Click **OK** to save the column setup view.



➤ To use a column setup

- In the **Columns** drop-down list, select the column setup that you want to use.



– or –

- Select **View > Column Setup**. Select the column setup you want to use and click **Use Now**. You can click **Properties** to view and modify the properties of a column setup.

Export Entries to Excel

You can quickly export a list of entries to Excel from the Address Book, Opportunities, Campaigns, Customer Service, or Hotlist pages in Maximizer Web Access. See "Exporting Entries to Microsoft Excel" on page 421 for more information.

Import Data from MXI or XML Files

You can import Address Book entries, customer service cases, and knowledge base articles from MXI (Maximizer XML Interface) or XML files into Maximizer Web Access.

When you import Address Book entries, the imported entries are saved to a favorite list. The favorite list is given a default name that includes the time and date of the import. You can choose not to create a favorite list while importing the file.

➤ To import data from a MXI or XML file

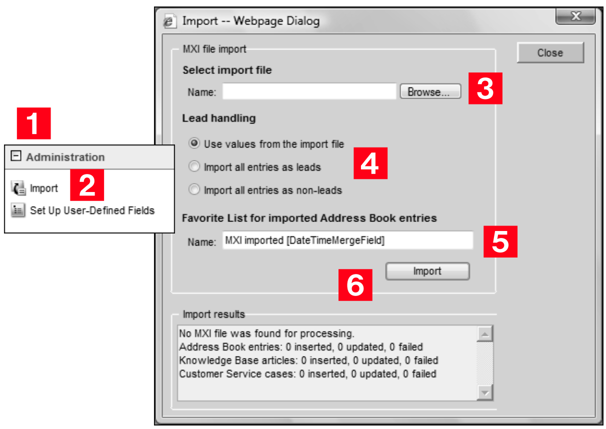
1. In the left navigation pane, click the **plus** sign beside Administration to open the section.

The Import option is only available if you have import privileges.

2. Click **Import**. The Import dialog box opens.
3. Click **Browse**, and choose the MXI or XML file.
4. In the **Lead Handling** area, choose if you want to import Address Book entries as leads or not.
5. If you do not want to create a favorite list, delete the text in the **Name** field.
6. Click **Import**. The file is imported.

If you do not have insert or modify rights, the import results will list the entries as "Failed."

When the import is finished, the **Import results** section updates to show the number of entries that were successfully inserted or modified and the number of entries that failed to be imported.



For information on importing data into Maximizer, see "Importing Address Book Data from MXI or XML Files" on page 399.

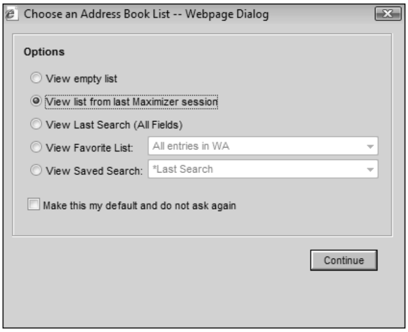
Working with Address Book Entries

Working with Address Book entries in Maximizer Web Access is very similar to the processes used in Maximizer.

Choose an Address Book List

If you deselect the "Ask at Address Book startup which list to view" option in the Personal Preferences dialog box, an empty Address Book list is displayed each time you open the Address Book page. (To open this dialog box, click the Personalize link in the Options section.)

When you first open the Address Book page, you are prompted to choose an Address Book list to view.



The following options are available for viewing an Address Book:

- An empty list (no Address book entries displayed).
- The list from your last Maximizer session.
- Your last search (All Fields).
- A Favorite List.
- A saved search.

If you want the list you select to be displayed every time you open the Address Book page, select the **Make this my default and do not ask again** option. If you later decide that you don't want the list to display by default, open the Personal Preferences dialog box and select the **Ask at Address Book startup which list to view** option.

Create Default Entries

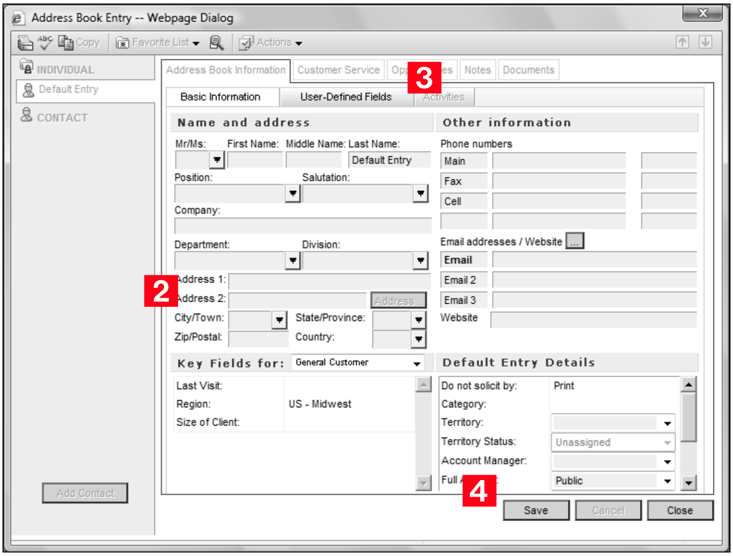
Default entries are user-specific so each user in the Address Book can have different default entries.

You can create a default entry in the Address Book and Customer Service pages. Then when you create a new entry in any of these pages, certain fields are already filled in for you. For example, if you know all your Address Book entries will have the same city and province, these are fields you could provide in a default entry for the Address Book entry page.

If you already have a default entry created through Maximizer, it will appear in Maximizer Web Access. If you modify the default entry in Maximizer Web Access, the changes will appear in Maximizer. The most recent changes to the default entry, regardless of where it was modified, appear in both applications.

➤ To create a default entry

1. In the Address Book or Customer Service pages, select **Default Entry** from the **Edit** menu. The Default Entry dialog box appears.
2. Fill in the fields to include as **default information**.
3. For Address Book page default entries, click the **User-Defined Fields** tab to include specific fields in the default entry.
4. When you are finished, click **Save**.



To modify a default entry, open the entry and make your changes. These types of default entries cannot be deleted in Maximizer Web Access, but can be modified.

View and Modify Address Book Entries

You can view and edit Address Book entries at any time. You can access an entry from the Address Book page or from a customer service case or opportunity attached to the entry.

➤ To view and modify an Address Book entry

1. In the Address Book page, click on the entry to open it.

   – or –

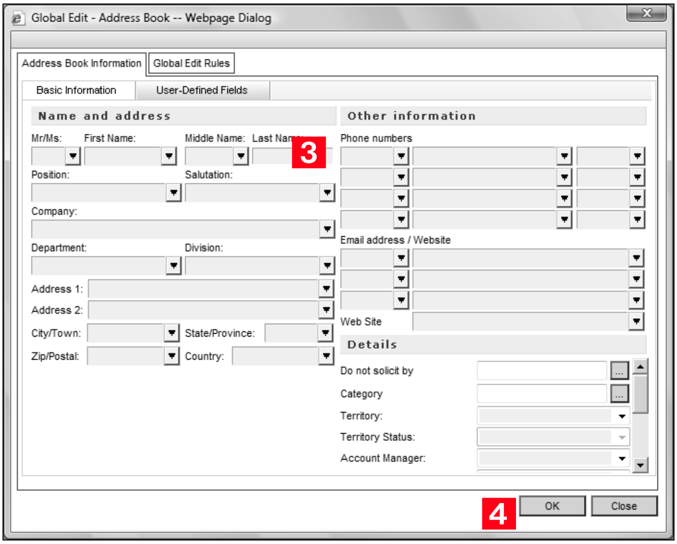
   In an open customer service case or opportunity, click the **View in Address Book** button.
2. To send an email message or visit an Address Book entry's website, click the related link in the **Email addresses/Website** section.
3. To modify the details of the entry, click **Edit** on the **Basic Information** tab.
4. To view and modify other information related to the entry, click the associated tab—**User-Defined Fields**, **Customer Service**, **Campaigns**, **Opportunities**, **Notes**, and **Documents**. See the following sections for more information on each of these elements.
5. Click **Save** when you modify an Address Book entry.

Apply Changes with Global Edits

You can edit many Address Book entries at once using global edit in Maximizer Web Access, just as you can in Maximizer. Global edits can also be made for opportunities and customer service cases.

➤ To perform a global edit

1. Select the list of entries for the global edit. If you do not select any entries, only the current entry is changed.
2. From the **Edit** menu, select **Global Edit**.
3. Make your changes. Note that not all fields can be modified with a global edit. Also note that you can remove certain fields with a global edit.
4. Click **OK** to start the global edit.



For more information on performing global edits, see “Change Several Address Book Entries with Global Edits” on page 48.

Add Address Book Entries

Adding an Address Book entry in Maximizer Web Access is very straightforward—it's similar to using Maximizer. New entries are added through the site in real time to your Maximizer Address Book.

➤ To add a new Address Book entry

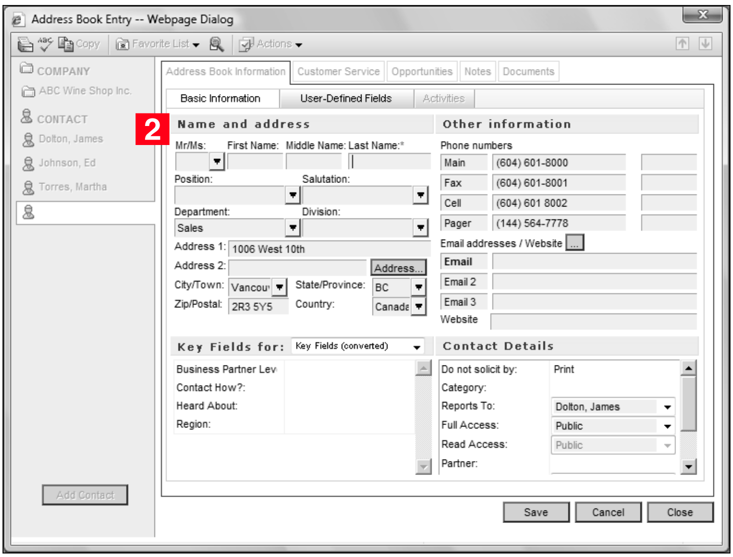
1 In the Address Book page, click **Edit** and select **Add Company**, **Add Individual**, or **Add Contact for**. Similarly, you can select one of the **Lead** options to add the entry as a lead type of entry.

2 Fill in the entry's information. You can use the Tab key to move from field to field.

Click **Address** to enter an alternate address for the entry.

When entering the phone numbers for the entry, keep in mind that the first field is for the type of phone e.g., fax, and that the third field is for an optional extension number. When entering email addresses, the first field is for the type of email address.

The **Key Fields** are set up in Administrator. These fields are commonly-used fields that are specific to your company. The **Details** fields belong to each type of entry by default. The values for these fields are also set up in Administrator.



3 Click the **User-Defined Fields** tab. Select the **Show blank fields** option to see blank user-defined fields in the Address

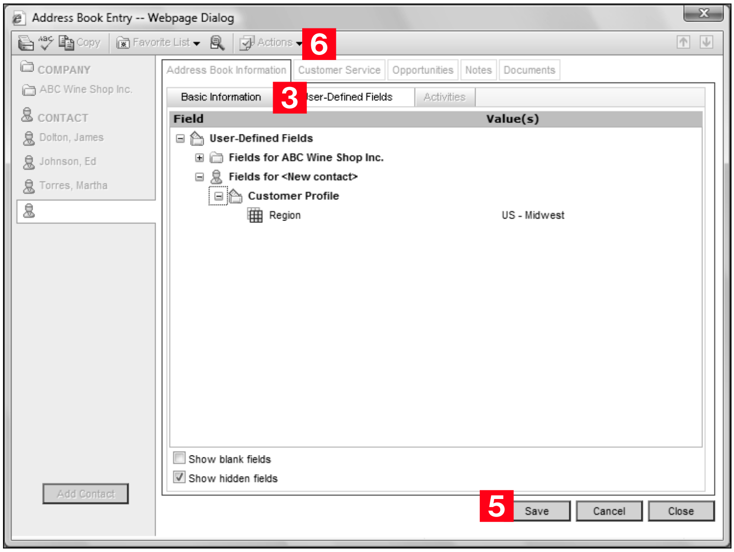
ⓘ Items cannot be added to table user-defined fields through Maximizer Web Access.

Book. Select the **Show hidden fields** option to see user-defined fields and folders that are set to hidden.

4 Click **Edit** and click on a **field** to add, modify, or select a value specific to the Address Book entry.

5 Click **Save** once you are done.

6 Use the buttons at the top of the page for common tasks such as printing a **Detailed Report** or adding the entry to a **Favorite List**. See “Add Address Book Entries to Your Address Book” on page 44 for more information on what each button does.



Create Address Book Entries from Email Messages

You can create Address Book entries from email messages in the Email page. The email messages are automatically saved to the Documents tab of the new Address Book entries.

➤ To create an Address Book entry from an Email Message

1. In the Email page, select the email message.
2. Select **Actions > Create New Address Book Entry from Current Email Message**.
3. Select the type of Address Book entry: **Individual**, **Company**, or **Company and Contact**. Then, click **OK**.
4. Enter the details for the new entry. When finished, click **Save**.

   The **Add Email to Address Book Entry** dialog box opens.

The document name cannot contain the following characters: \ / : * ? < > |

5. Enter properties of the document including the name, owner, category, and description. When finished, click **OK**.

For more information on using the Email page, see “Sending and Receiving Email” on page 278.

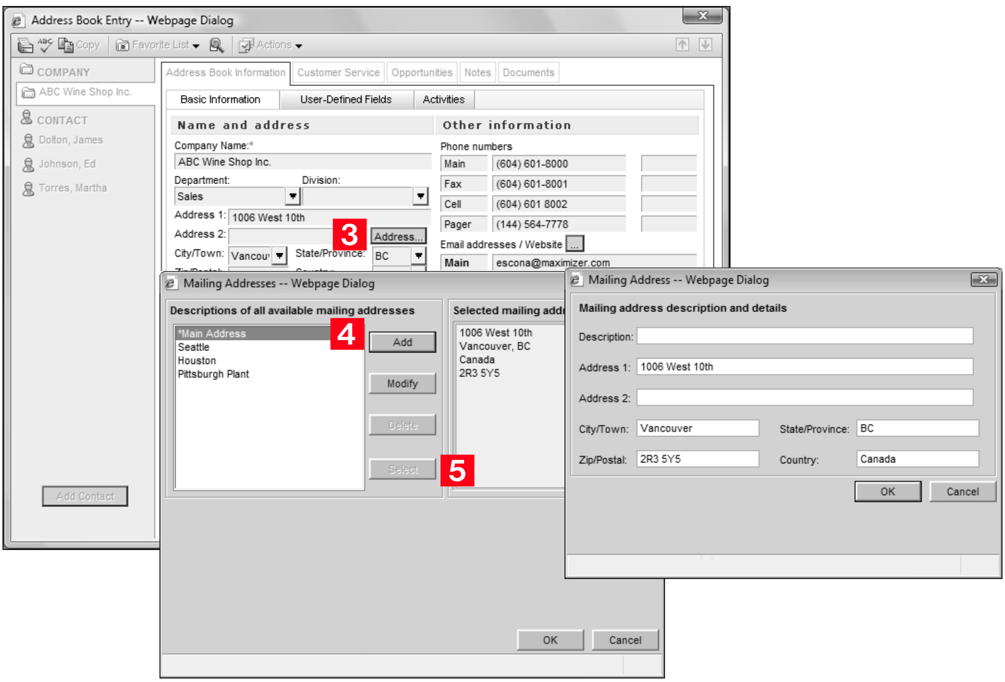
View, Modify, and Add Alternate Mailing Addresses

The main address is added to the Basic Information tab of an Address Book entry in Maximizer Web Access and alternate address information is added by clicking the Address button on the Basic Information tab.

➤ To view, modify, or add alternate addresses

1. If necessary, first run a **search** to locate the Address Book entry.
2. Open the entry by clicking on it and then click **Edit**.
3. Click **Address**. The Mailing Addresses dialog box appears.
4. Click **Add** to enter an alternate address. If you are modifying an address, select the address and click **Modify**.
5. After adding or editing an alternate address, you can set it as the default (or main) address by clicking **Select** while the address is selected. The address then appears in the Basic Information tab.

ⓘ The Main Address cannot be edited in the Mailing Address page.



Use Territory Management

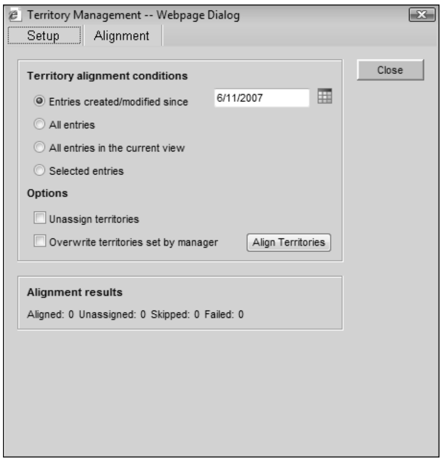
For detailed information on working with Territory Management, refer to "Using Territory Management" on page 55 and Maximizer Web Access Help.

Use Territory Management to set up territories and assign them to Company and Individual Address Book entries. You can assign entries manually, or automatically, through the use of territory rules. To use Territory Management, you must be a Sales Manager. However, once territories are created and assigned, other Maximizer users can use the Territory and Territory Status fields in tasks such as searching and creating column setups. They can also assign territories when creating new entries and in other limited circumstances.

To use Territory Management, select Edit > Territory Management. If you do not have the Sales Manager role, this menu item is not available.

The Territory Management dialog box contains two tabs:

- A Setup tab, where you create territories and territory rules.
- An Alignment tab, where you automatically align territories to Address Book entries based on territory rules, and the alignment conditions and options you set on this tab.



Move Contacts to Other Companies or Individuals

You can move a contact from one company or individual to another company or individual. The contact's notes, documents, and user-defined fields move with the contact. Appointments and tasks are updated to reflect the new location.

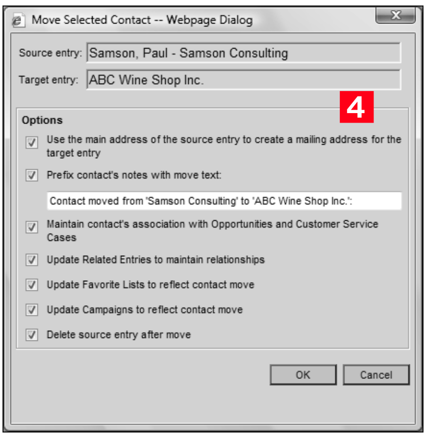
You have a number of options when moving a contact:

- Update the contact's address to the main address of the new company or individual.
- Prefix all of the contact's notes with text indicating that the contact has moved.
- Maintain the contact's association with opportunities and customer service cases.
- Maintain relationships between the contact and related entries.
- Update favorite lists containing the contact to reflect the contact's move.
- Update campaigns to reflect the contact's new location.
- Delete or save the contact's entry with the original company.

➤ To move a contact to another company

The Move Selected Contact option is only available when a contact is selected and for users with permission to insert, modify, and delete Address Book entries.

1. In the Address Book page, select the contact.
2. Select **Edit > Move Selected Contact**.
3. In the **Find Target Address Book Entry** dialog box, enter the search criteria, and click **Search**. Select the company that the contact is moving to, and click **OK**.
4. In the **Move Selected Contact** dialog box, select the options for the move. Click **OK** to complete the move.



Draw Maps of Address Book Entries

You can quickly draw a map showing the location of the selected Address Book entry or of the Address Book entry associated with the selected opportunity or customer service case.

➤ To draw a map of an Address Book entry

1. Select or open an Address Book entry, opportunity, or customer service case.
2. Select **Actions > Draw a Map**.

   The address of the selected Address Book entry is displayed.
3. Choose an online map site and click **Go**.

The map to the Address Book entry's location appears.

Log Calls with Address Book Entries

You can use Maximizer Web Access to log phone calls with Address Book entries. When you phone an Address Book entry or receive a call from an Address Book entry, Maximizer Web Access times the call, creates a phone note for the entry, and prompts for a follow-up activity.

You can also time and log other tasks by selecting Actions > Time a Task. See the Maximizer Web Access help for details.

Depending on your logging preferences, a phone note is automatically saved to the Address Book entry, customer service case, or opportunity entry associated with the call.

➤ To log a phone call

1. Select or open the entry that you want to log the call with.
2. To log an outgoing call, select **Actions > Make a Call**. To log an incoming call, select **Actions > Receive a Call**.
3. If you are logging an outgoing call, select the phone number that you are calling, and select a response:
   - If you select **Message**, **No Answer**, or **Busy**, the log is automatically saved in a note to the entry with the result of the call.
   - If you select **Answered** or if you are logging an incoming call, the Phone dialog box opens timing the duration of the phone call.

The Message, No Answer, and Busy options are only available if you have phone call logging preferences set to create notes.

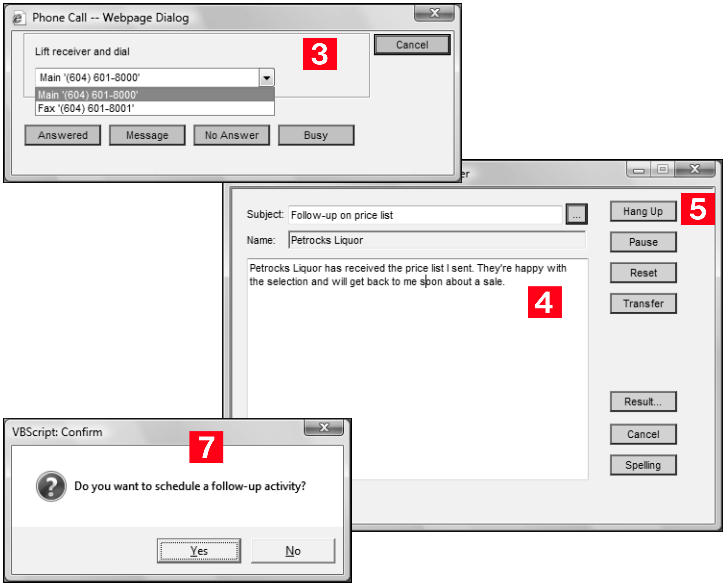
4. In the **Subject** field, enter a subject for the phone call or click the ellipsis button and choose a value for the subject. Record notes on your call as you talk.

You can also select a result of the phone call from the Phone dialog box: click the Result button before saving the note.

5 When the phone call is finished, click **Hang Up**. The timer stops.

6 Edit the note, and click **Save**. If your phone call logging preferences are set to show results on hang-up, you are prompted to select a result of the phone call. Select a value for the result.

7 Select whether or not you want to schedule a follow-up activity. If you select **Yes**, specify the properties of the follow-up activity.



If you schedule a follow-up activity, the activity is saved to your Hotlist. For more information on using the Hotlist in Maximizer Web Access, see "Working with Your Hotlist" on page 286.

Sending and Receiving Email

You can use the Email page in Maximizer Web Access to send and receive email using your existing email system. You can also use the Address Book page to quickly and easily send email to Address Book entries. When you create email messages in the Address Book page, you can insert merge fields into the message text.

To set email preferences, click the Preferences link in the Options section and click the Email tab. For more information, see Maximizer Web Access Help.

Log In to Your Email Server

You may need to log in to your email server before performing your email tasks.

➤ To log in to your email server

1. Click the **Email** icon in the left navigation pane. The login page opens.
2. If necessary, enter the name of the email server and/or your email server user ID.
3. Enter your email server password.
4. Click the **Log In** button.

Your user ID and password are saved to your email preferences.

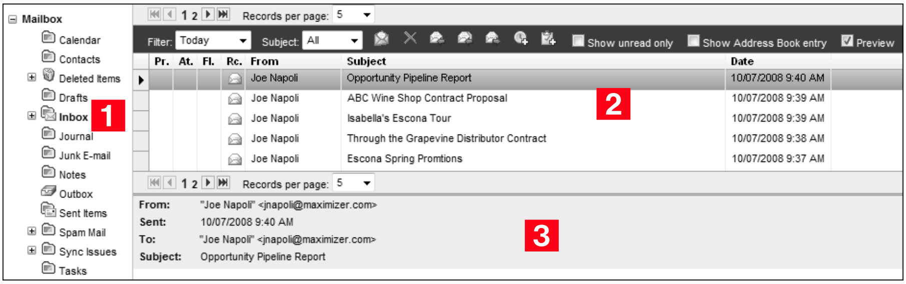
Use the Email Page

When the Email page opens you can begin performing your email tasks. You can send email messages, reply to messages, move messages, and perform other common email tasks. You can also save messages to associated Address Book entries.

➤ To use the email page

1. Select email folders on the left side of the email page.
2. Select items in a folder in the top-right part of the page. You can change the size of this area by changing the number of records that are displayed on each page.

3 View the currently selected email message in the preview pane. You can toggle the preview pane on and off with the **Preview** checkbox in the upper-right corner of the page.



Organize Email Messages in the Email Page

You can easily move your email messages from folder to folder in the Email page.

➤ To move an email message to another folder

You can move multiple messages at a time. To do this, select the messages and then select Edit > Move to Folder.

1 Select the message you want to move.

2 Select **Edit > Move to Folder**. The **Move Items** dialog box opens.

3 Select the folder you want to move the message to. The name of the selected folder is displayed in boldface.

4 Click **OK**. The message is moved to the selected folder.

Open Address Book Entries from the Email Page

You can open Address Book entries associated with email messages directly from the Email page. Email messages must be sent from addresses matching the email addresses of Address Book entries.

➤ To open an Address Book entry from the Email Page

1 In the Email page, select the email message that you want to open.

2 Select **Edit > Open Address Book Entry**.

The Address Book entry opens without leaving the Email page.

Save Email Messages to Entries

You can save email messages to existing Address Book entries or customer service cases in Maximizer Web Access. Email messages are saved to the Documents tab of entries.

➤ To save an email message

1. In the Email page, select the email message.
2. On the **Actions** menu, select **Save Email Message to Address Book Entry/Customer Service Case**.

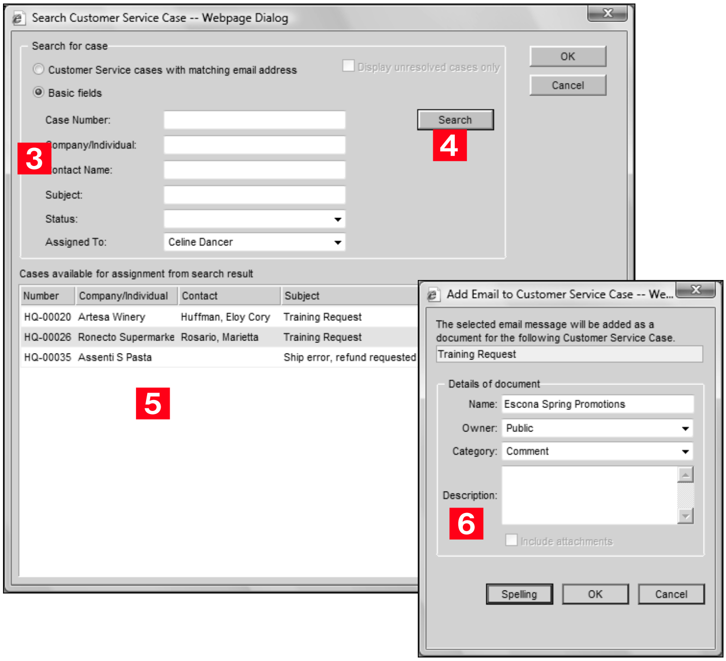
   The **Search Address Book** or the **Search Customer Service Case** dialog box opens displaying entries with matching email addresses.

   You can select one of the entries listed, or you can search for another entry.
3. To search for another entry, select **Last name** or **Company** for Address Book entries, or select **Basic fields** for customer service cases. Then, enter the search criteria.
4. Click **Search**. The dialog box updates to display the new list of entries.
5. Select an entry and click **OK**.

   The **Add Email to Address Book Entry** or the **Add Email to Customer Service Case** dialog box opens.

The document name cannot contain the following characters: \ / : * ? < > |

6 Enter properties of the document including the name, owner, category, and description. When finished, click **OK**.



View Email Messages from the Documents Tab

You can open and view email messages that have been saved to the Documents tab of an Address Book entry, opportunity, or customer service case. You can also reply to, forward, or print the email message.

➤ To view an email message from the Documents tab

1 In the Address Book, Opportunities, or Customer Service page, open the entry the email message was saved to.

2 Click the **Documents** tab.

3 Select the email message you want to view and click the **Download** button. The email message opens in the View Email dialog box.

Compose and Send Email Messages from the Email Page

You can compose your message in either HTML or plain text format. To change the format, use the Format drop-down list.

You can attach files to your message. If you are using the HTML format, you can also insert hyperlinks. To check the spelling in your message, click the Spell Checker button.

➤ To compose and send an email message

1. In the Email page, select **Edit > Compose New Email**. The Send Email dialog box opens.
2. Enter email addresses in the **To**, **Cc**, or **Bcc** boxes. (Separate email addresses with a semicolon.)

   – or –

   Click the **To**, **Cc**, or **Bcc** buttons to select email recipients. The Add Email Recipient dialog box opens.

   - To select email recipients from the Address Book, select **Maximizer Address Book** in the **Search for recipients** drop-down box. You can search by last name or by company. For entries with multiple email addresses, select the desired address from the drop-down list in the row for the entry.
   - To select email recipients from your global address list, select **Global Address List** in the **Search for recipients** drop-down box. You can search by first name, by last name, or by group name.

Do not use angle brackets, < or >, in the email editor. Any text between the brackets will be removed from the email message.

3. Enter a subject and your email text.
4. If required, change the priority level of the message to **Low** or **High**.
5. If the email recipient is associated with an Address Book entry, set the logging options. See "Send Email Messages from the Address Book Page" on page 283 for more information.
6. Click **Send**.

Send Email Messages from the Address Book Page

You can send email to Address Book entries directly from the Address Book page. The From Address is automatically retrieved from your user properties. If you do not have an email address, your email message will not be sent.

➤ To send an email message

1. Click the **Address Book** icon to open the Address Book page.
2. Select the Address Book entry or entries you are sending the email to, or create a list of Address Book entries. Choose **Actions > Write an Email**.

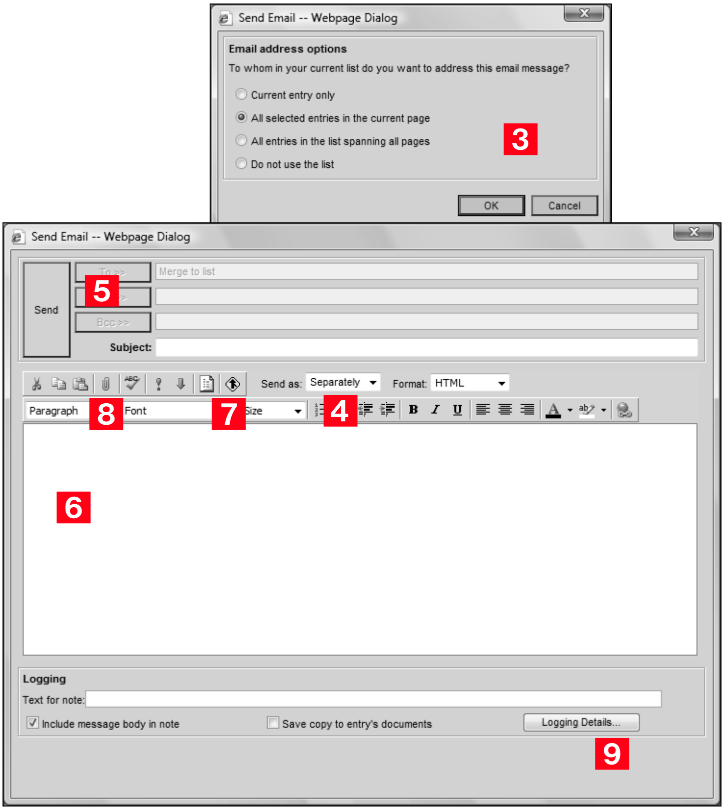
   - or -

   Open an Address Book entry and click the **email address link** on the Basic Information tab.
3. In the **Send Email** dialog box, choose how to use the current Address Book list. You can send the message to only the current entry, to all selected entries, to all entries in the list, or to none of the entries. If an Address Book entry is currently open, you do not choose a recipient at this point.
4. To send separate email messages to multiple Address Book entries, choose the **Separately** option in the **Send As** drop-down list. Leaving the default selection of **One email** sends the email message to all the selected entries at once.

   ⓘ You can set a default preference for sending email separately when you are sending email to multiple Address Book entries. The setting is found under Options > Preferences > Email.
5. To add more email recipients, click the **To**, **Cc**, or **Bcc** buttons. You can search the current Address Book or your global address list. These options are not available if the Separately option is selected.
6. Enter a subject and your email text. Use the toolbar buttons and Font drop-down lists to format your message.

   ⓘ Do not use angle brackets, < or >, in the email editor. Any text between the brackets will be removed from the email message.
7. If you are sending email to Address Book entries separately, you have the option of inserting merge fields into the message text. To add merge fields, select the **Insert Fields** button and select fields from the **Available Fields** list. When the message is sent, the field values corresponding to the Address Book entry are merged into the message.
8. Select any attachments you would like to send with the email message.
9. Set your logging options as follows:
   - In the **Text for note** field, enter any additional text you would like to log as part of the note created by the email message.

- Select the **Include message body in note** option to save the message to the note created.
- Select the **Save copy to entry's documents** option to save the message as a document for the entry.
- Click the **Logging Details** button and then the **Assign More** button to log the email details to additional Address Book entries.



Create Appointments and Tasks from the Email Page

You can create an appointment or a task directly from the Email page in Maximizer Web Access. Depending on the menu item you choose, appointments/tasks are either personal or associated with Address Book entries.

➤ To create an appointment or a task from the Email page

1. Select the email message you want to create an appointment or a task for in the Email page.
2. On the Email page toolbar, click the **Create Appointment from Current Email Message** or the **Create Task from Current Email Message** button.

   – or –

   On the **Actions** menu, select **Create Appointment/Task from Current Email Message**.
3. In the **Search Address Book** dialog box, enter the search criteria and click the **Search** button.

   This step is necessary if the related Address Book entry does not appear in the search dialog box.
4. Select the Address Book entry and click **OK**.
5. Enter the appointment/task details and click **OK**.

   Once the appointment/task is created, the **Add Email to Address Book** dialog box appears notifying you that the selected email message will be added to the associated Address Book entry as a document.

➤ To create a personal appointment or task from the Email page

1. Select the email message you want to create an appointment or a task for in the Email page.
2. From the **Actions** menu in the Email page, select **Create Personal Appointment/Task from Current Email Message**.
3. Enter the appointment/task details and click **OK**.

Working with Your Hotlist

When you click the Hotlist icon, Maximizer Web Access displays the current day's tasks by default.

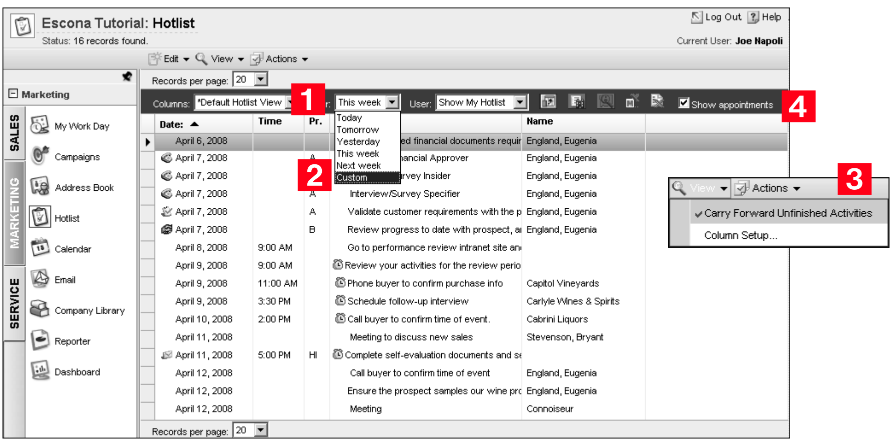
Tasks can also be viewed, modified, and marked as complete from the daily calendar view.

View Hotlist Tasks

To view another user's Hotlist, the user must give you access in Maximizer's File > Preferences > Calendar/Hotlist tab.

➤ To view Hotlist tasks

1. You can choose to view Hotlist tasks scheduled for today, tomorrow, yesterday, this week, or next week by selecting the appropriate option from the **View bar** in the Hotlist window. If you want to view tasks associated with an Address Book entry, select the Address Book entry before clicking the **Hotlist** icon to see all of the entry's associated tasks.
2. Select **Custom** and then specify a **Start date** and **End date** to find tasks within a specified date range. To modify the date range for a custom search for tasks, click the **Build Hotlist** button.
3. You can view old tasks (tasks scheduled for a date prior to the current date) that have not been completed by choosing **Carry forward unfinished activities** from the View menu. Note that this option is not selected by default.
4. To view appointments, as well as Hotlist tasks, select the **Show appointments** checkbox.



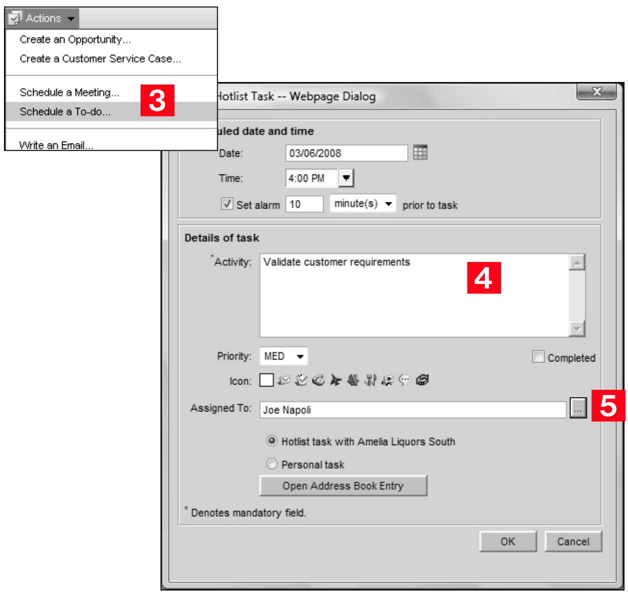
Add Hotlist Tasks

You can create Hotlist tasks for Address Book entries, opportunities, and customer service cases. You can also create personal Hotlist tasks. Personal Hotlist tasks are not associated with Companies, Individuals, or Contacts.

➤ To add a Hotlist task

1. If necessary, first run a search to locate the Address Book entry, opportunity, or customer service case.
2. Select or open the entry.
3. Click the **Actions** button and select **Schedule a To-Do**. Or, if you are in the Hotlist Task page, click the **Edit** button and select **Add Task**.
4. Enter the Hotlist task details.
5. To assign the task to a user, click the ellipsis button beside the **Assigned to** box, select a user from the Assign User dialog box, and then click **OK**. Select the **Personal task** option if you want to make the task personal.
6. Click **OK** to close and save the Hotlist task. You can now view the task in the Hotlist page.

In the Assign User dialog box, available users are displayed by group (all users, departments, disabled users, divisions, security groups, or teams). If you don't want to display users by group, go to Maximizer and deselect the Display users by groups option. (Select File > Preferences > System Defaults tab.)



Reassign Hotlist Tasks

You can reassign tasks in the Hotlist page.

➤ To reassign a Hotlist task

1. In the Hotlist page, select the task you want to reassign.
2. Click the **Edit** button and select **Reassign**. The Reassign Hotlist Tasks dialog box opens. Users are displayed by group as they are in the Assign User dialog box.
3. Select a user and click **OK**. The task is reassigned.

Modify Hotlist Tasks

Tasks can be modified in the Hotlist window or the Calendar window.

To mark a task as complete, click the checkbox in the last column of the task row. You can also open the task in the Hotlist window and click the Task is Completed checkbox.

➤ To modify a Hotlist task

1. In the Hotlist page, select the **Hotlist task**.
2. Open the Hotlist task you want to modify by clicking on it.

   If you are in the Calendar page, double-click on the Hotlist task to open it.
3. Make your changes in the **Hotlist Task** dialog box.
4. Click **OK** to save the task and close the dialog box.

Delete Hotlist Tasks

➤ To delete a Hotlist task

1. In the Hotlist page, select the **Hotlist task**.
2. Click the **Edit** button and select **Delete Selected Tasks**.

Working with Your Calendar

To view another user's calendar, the user must give you access in Maximizer's File > Preferences > Calendar/ Hotlist tab.

You can schedule, modify, and view appointments in Maximizer Web Access. The Calendar window in Maximizer Web Access is very similar to the calendar in Maximizer. See "Calendar Window" on page 87 for more information on the general functionality of the Maximizer calendar.

View Appointments

Maximizer Web Access displays your calendar in monthly, weekly, weekly list, and daily views.

You can view another user's calendar if that user has given you, or a group to which you belong, access using the Calendar/Hotlist preferences tab in Maximizer. You can also view booked resources. The users and resources/locations must be selected in the Calendar Users section of the page for the associated bookings to appear in the calendar. Color bars/icons for both users and resources/locations indicate a booking.

Hotlist tasks are also displayed in the Hotlist Tasks section of the page. These can be modified or marked complete in the calendar.

➤ To view your appointments

1. Click the **Calendar** icon.

To open the Preferences dialog box, expand the Options section and click the Preferences link.

2. Choose a calendar view by clicking the **Daily**, **Weekly**, **Weekly List**, or **Monthly** links in the top of the page. You can adjust the default in the Preferences dialog box, on the Calendar/Hotlist tab.

3. To quickly navigate from one day to the next in the daily calendar view, use the calendar **arrow** buttons located in the upper-left section of the window. You can also navigate from week to week and month to month using these buttons when in the weekly or monthly calendar views.

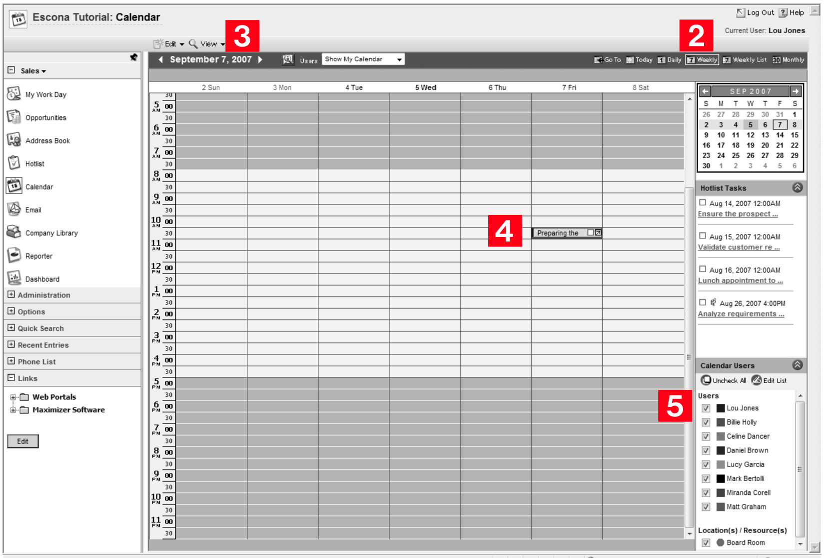
   Use the **arrow** buttons in the upper-right section of the window to move from year to year (monthly view) or month to month (daily, weekly, and weekly list view). Click on a month to show it in the main portion of the Calendar window.

In the weekly list view, all the appointments for a day are listed in an easy-to-view format. A scroll bar appears when the appointments don't fit in the cell. Appointment details such as start/end time and location are displayed.

4. To open an appointment in the monthly view, click on an **appointment**. In the weekly, weekly list, and daily views, double-click on an appointment to open it.

5. To view another user's appointments, select the checkbox beside the user's name in the **Calendar Users** list. Use the **Edit List** option to add users and resources and to set their colors.

Holding your mouse over an **appointment** provides you with more details.



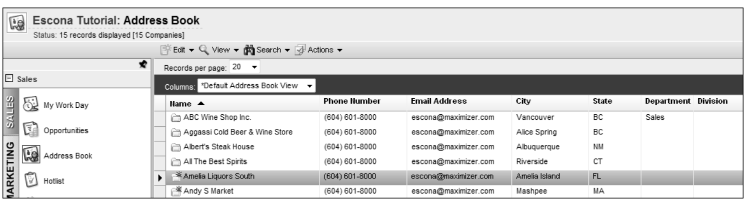
Add Appointments

Use Maximizer Web Access to add appointments to your Maximizer calendar. You can book locations/resources, invite other users, and assign Address Book entries to the appointment.

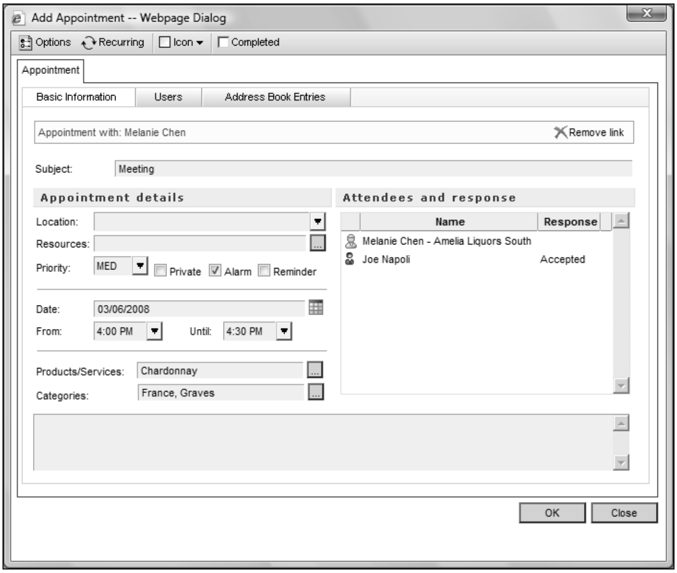
Add appointments from a main page (Address Book, Opportunities, Customer Service, and Campaigns), or from the Calendar page. If you add an appointment from a main page, the appointment is by default linked to the current entry. If you add an appointment from the Calendar page, it is by default created as a personal appointment.

➤ To add an appointment from a main page

1 If you want to schedule an appointment with a specific entry, select or open the entry.



2 Click the **Actions** button and select **Schedule a Meeting**. The Add Appointment dialog box opens. Information about the current entry is displayed in the information bar.



Available users are displayed in the Appointment dialog box by group (all users, departments, disabled users, divisions, security groups, or teams). If you don't want to display users by group, go to Options > Personalize and deselect the Display Users by Groups option.

3 Enter the appointment details and invite meeting attendees. For more information, see "Using the Appointment Dialog Box" in Maximizer Web Access Help, or "Using the Add/Modify Appointment Dialog Box" on page 90.

4 Click **OK** to save the appointment and close the dialog box.

➤ To add an appointment from the Calendar page

1 In the Calendar page, click the **Edit** button and select **Add Appointment**.

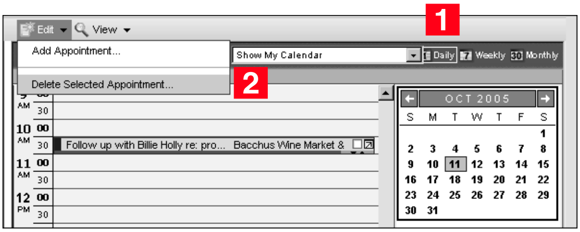
2 Enter the appointment details and invite meeting attendees. If required, link the appointment to the current entry.

3 Click **OK** to save the appointment and close the dialog box.

Delete Appointments

➤ To delete an appointment

1. In the Calendar page, go to the daily, weekly, or weekly list view and select the appointment.
2. Click the **Edit** button and select **Delete Selected Appointment**.



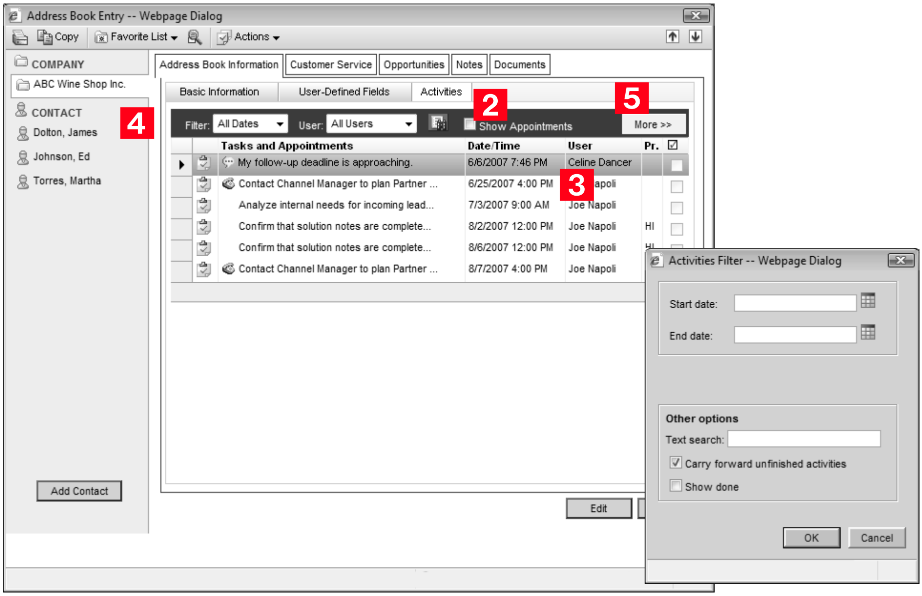
Use the Activities Tab to Track Appointments and Tasks

You can view activities scheduled for an Address Book entries or customer service case from the Activities tab of the entry. You can also view activities specific to opportunities on the Sales Plan tab.

➤ To view activities scheduled for an entry

1. Open the related Address Book entry, customer service case, or opportunity.
2. For Address Book entries or customer service cases, click the **Activities** tab. For opportunities, click the **Sales Plans** tab.
3. By default, only tasks are displayed in the Activities tab. You can choose to view appointments as well by selecting the **Show Appointments** option.
4. Filtering can be done for the activities list by using the **Filter** drop-down list, **User** drop-down list, and the **Custom Filter** button.
5. Click **More** to add, modify, or delete an activity.

ⓘ Click the Show strategy option to show the selected strategy for the opportunity.


Address Book Entry -- Webpage Dialog
Copy
Favorite List
Actions
COMPANY
ABC Wine Shop Inc.
CONTACT
Dolton, James
Johnson, Ed
Torres, Martha
Add Contact
Address Book Information
Customer Service
Opportunities
Notes
Documents
Basic Information
User-Defined Fields
Activities
Filter: All Dates
User: All Users
Show Appointments
More >>
2
3
4
5
Tasks and Appointments
Date/Time
User
Pr.
My follow-up deadline is approaching.
6/6/2007 7:46 PM
Celine Dancer
Contact Channel Manager to plan Partner ...
6/25/2007 4:00 PM
Analyze internal needs for incoming lead...
7/3/2007 9:00 AM
Joe Napoli
Confirm that solution notes are complete...
8/2/2007 12:00 PM
Joe Napoli
HI
Confirm that solution notes are complete...
8/6/2007 12:00 PM
Joe Napoli
Contact Channel Manager to plan Partner ...
8/7/2007 4:00 PM
Joe Napoli
Edit
Activities Filter -- Webpage Dialog
Start date:
End date:
Other options
Text search:
Carry forward unfinished activities
Show done
OK
Cancel

Working with Action Plans

If an Address Book entry has a scheduled action plan, you can view the action plan details on the entry's Activities tab. You can also modify the name and description of the action plan.

➤ To view or modify action plan details

1. Open the Address Book entry and click the **Activities** tab.
2. Select the action plan you want to view or modify from the **Action Plan options** drop-down list.
3. Click the **Details** button. The Action Plan Details dialog box opens. Details for both the action plan and the associated template are displayed.
4. If required, enter a new **Plan name** or **Description**.
5. Click the **Properties** button to view properties such as Creation details and Last modification.
6. Click **OK** to return to the **Activities** tab.

Use Action Plans to Create Appointments and Hotlist Tasks

You must have the corresponding access rights (Action Plan Library privilege) as a user to create Action Plan templates.

Action Plan templates are created in the Action Plan Library. The Action Plan Library is accessed under the Options link in Maximizer Web Access.

➤ To create an Action Plan template in the Action Plan Library

1. Click the **Options** link in Maximizer Web Access**.**
2. Click the **Action Plan Library** link.
3. Enter the **Action Plan** details. See "Use Action Plans to Create Appointments and Hotlist Tasks" on page 94 for more information on creating Action Plans.

Action Plan templates can be applied to Address Book entries, which create a set of appointments and/or Hotlist tasks.

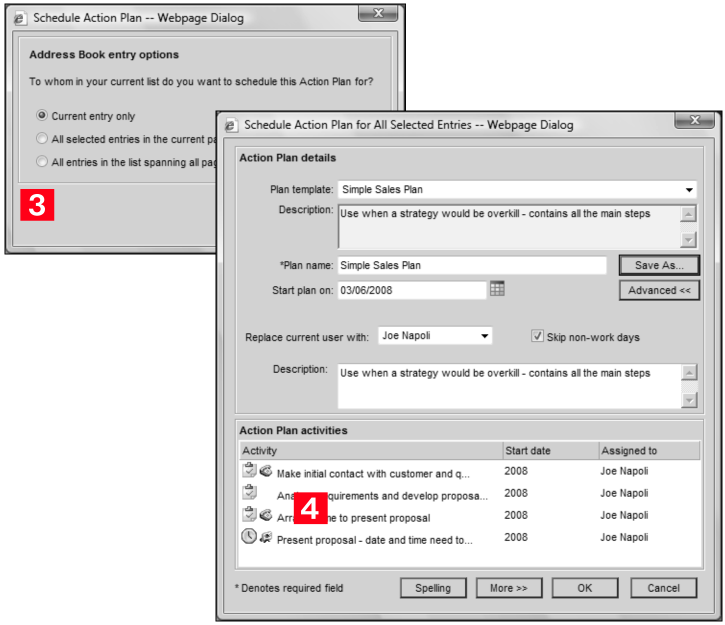
➤ To schedule an Action Plan for Address Book entries

1. In the Address Book page, select or open the entry or entries.
2. Select **Actions > Schedule an Action Plan**.

3 If you selected multiple Address Book entries, specify the entries for which you want to schedule the Action Plan. You can schedule the Action plan for only the current entry, for all selected entries, or for all entries in the current list.

4 Select an Action Plan template from the **Plan template** drop-down list.

5 Enter the related details for the Action Plan. You can change the activities and tasks in the Action Plan and you can add more activities and tasks to the Action Plan. To save the changes in a template, click **Save As**.



For more information on using Action Plans and creating Action Plan templates, see “Use Action Plans to Create Appointments and Hotlist Tasks” on page 94.

Viewing, Modifying, and Adding Notes

When a note is open, you can use the Previous and Next buttons to scroll through all notes.

You can view, edit, and add notes for Address Book entries, campaigns, opportunities, and customer service cases just as you would in Maximizer.

You can also add default notes so that the text automatically appears as part of the note body when new manual notes are created.

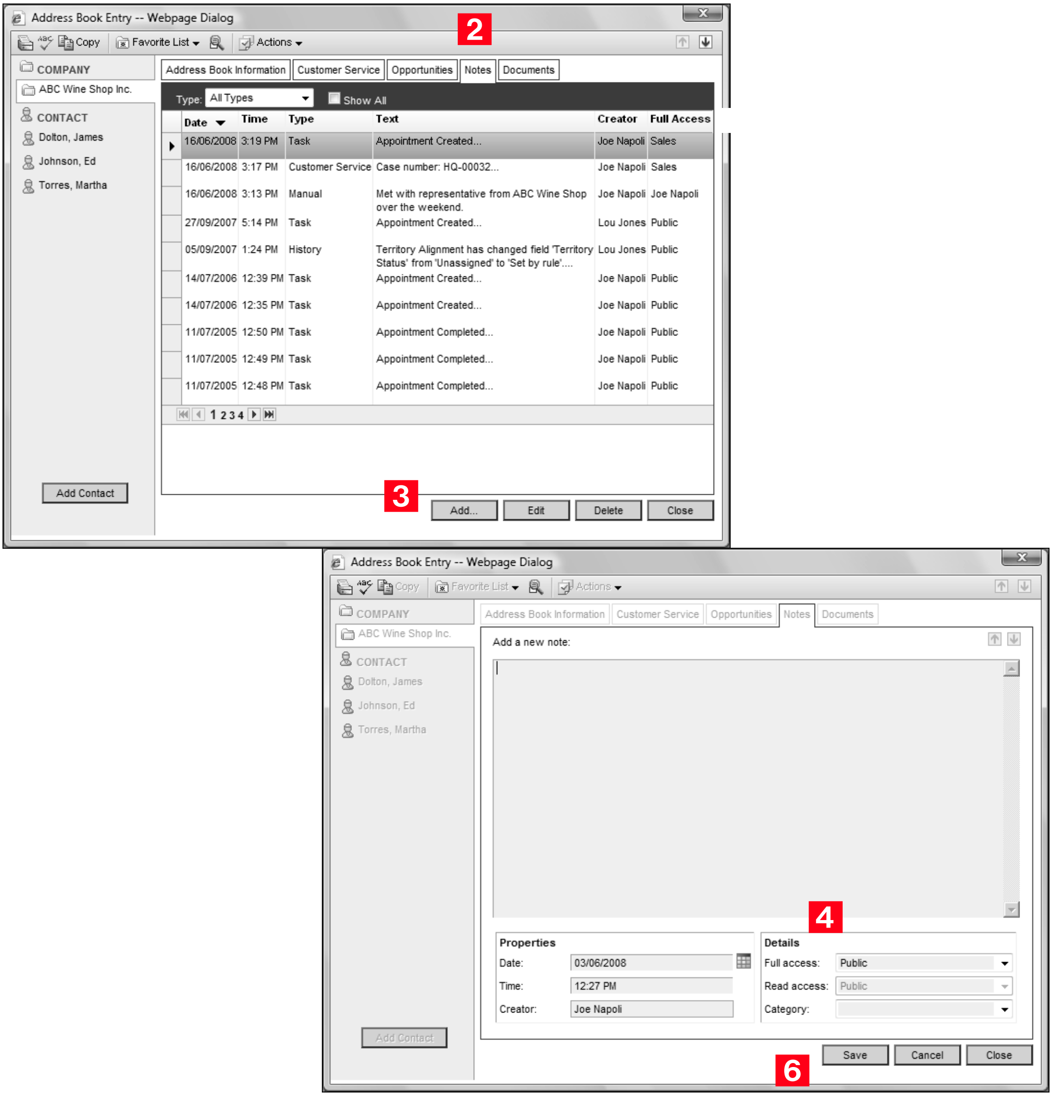
➤ To view, modify, or add a note

1. If necessary, first run a search to locate the entry for which you are adding the note.
2. Open the entry by clicking on it and then click the **Notes** tab.
3. To add a note, click **Add**.
4. Enter the note details. You can control who can see this note by choosing a certain user or security group in the **Full Access** and **Read Access** fields.
5. If your system administrator has set up custom note types—called categories—you can optionally select a **category**.

   To edit or view a note, click on the note and make your changes. To delete a note, select the note in the Notes tab and click **Delete**.

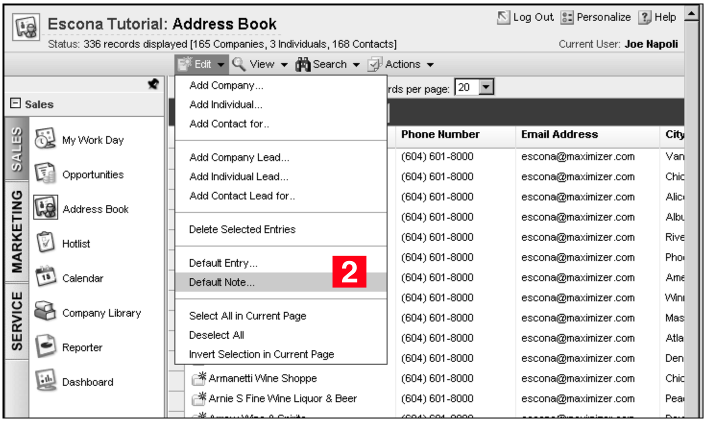
   To check the spelling in your note, click the **Spell Check** button.

6 Click **Save** to save any changes and return to the Notes tab. Clicking **Close** returns you to the Address Book, Opportunities, Campaigns, or Customer Service page.

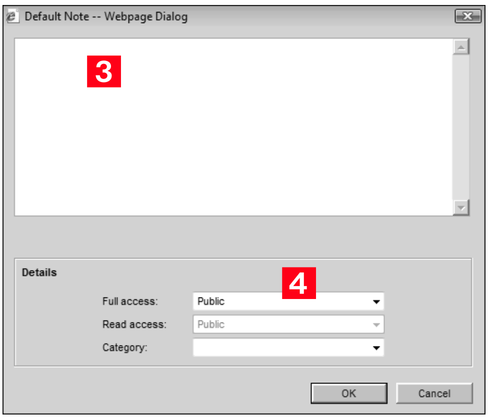


➤ To add a default note

1. In the Address Book, Opportunities, Campaigns, or Customer Service pages, select an entry.
2. Select **Default Note** from the **Edit** menu.



3. Enter the **default note text**. This information appears as part of the note each time a manual note for an Address Book entry, an opportunity, a campaign, or a customer service case is created. Note that the default note is different for each type of entry.
4. Optionally, select a user or group in the **Full Access/Read Access** fields and specify the note **Category**.



Viewing and Modifying User-Defined Fields

User-defined fields are custom fields used to further categorize Address Book, customer service, and opportunity information. Typically, these fields are set up by your system administrator in Administrator, however, users who have been given the access rights can set up user-defined fields in Maximizer Web Access and Maximizer.

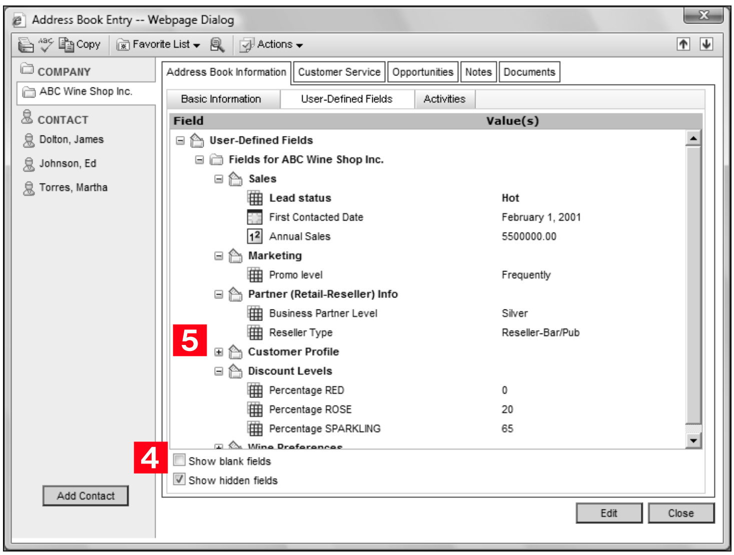
For more information on user-defined fields, refer to “Recording Additional Information with User-Defined Fields” on page 65.

➤ To view user-defined fields

1. If necessary, first run a search to locate the related Address Book entry, customer service case, or opportunity.
2. Open the **entry** by clicking on it.
3. Click on the **User-Defined Fields** tab. All user-defined fields for the current entry are shown in the tab, grouped in folders. Mandatory fields are denoted by an asterisk in brackets following the field name.

   When you have a Contact selected in the User-Defined Fields tab, both the Contact’s and the Company’s user-defined fields are displayed. For cases and opportunities, user-defined fields specific to each module are also displayed.

4. Select the **Show blank fields** option to view blank user-defined fields. Select the **Show hidden fields** option to view user-defined fields and folders that are set to hidden.
5. Click on the **plus sign** to expand a user-defined field folder.



➤ To modify user-defined field values

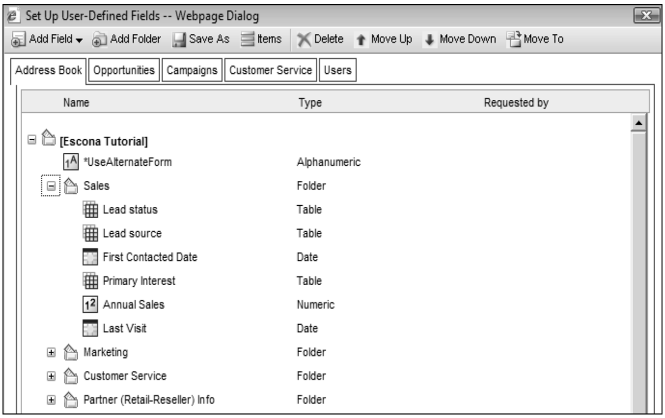
1. In the User-Defined Fields tab, click on a **user-defined field**.
2. Change the value of a field by entering a new value or selecting a value from the drop-down list or calendar.

Set Up User-Defined Fields

Use the Set Up User Defined Fields option in Maximizer Web Access to add, modify, or delete user-defined fields. To use this option, you must have the access right to set up user-defined fields.

➤ To use the Set Up User-Defined Fields option

1. In the left navigation pane, click the plus sign beside **Administrator** to expand the section.
2. Click **Set Up User-Defined Fields**. The Set Up User-Defined Fields dialog box opens.



The user-defined fields and folders are organized in a tree view. There can be multiple levels of folders, each containing other folders or user-defined fields. The folder structure allows a maximum of three folder levels. You can move fields and folders within this structure.

3. Click the tab for the category of user-defined fields you want to work with. For example, if you are creating a user-defined field for Address Book entries, click the Address Book tab.

Work with User-Defined Fields

The following procedures show you how to:

- Move user-defined fields and folders
- Add, modify, and delete fields and folders
- Create a copy of a user-defined field
- Add items to a table field
- Modify and delete table items

To select a field or folder, click to the right of it. The field or folder is now highlighted in blue.

➤ To move a user-defined field or folder to a folder

1. Select the field or folder you want to move.
2. Click the **Move To** button and select the folder you want to move the field or folder to from the **Folder name** drop-down list.
3. Click **Save**.

➤ To reposition a user-defined field or folder

1. Select the field or folder you want to reposition.
2. To move the field or folder up one position, click the **Move Up** button.
3. To move the field or folder down one position, click the **Move Down** button.

➤ To add a new folder for user-defined fields

1. Click the **Add Folder** button.
2. Enter a name for the folder.
3. If required, select the **Set to Hidden** option.
4. Click **Save**.

If you set user-defined fields and folders to hidden, users can hide them in certain dialog boxes by deselecting the Show hidden fields option. Note that mandatory fields cannot be set to hidden.

➤ To add a new user-defined field

1. Click the **Add Field** button and select the type of user-defined field you are creating. For example, select **Add alphanumeric** to create an alphanumeric field.
2. Specify the user-defined field properties.
3. Click **Save**.

The properties you can set for a field type varies. For more information, refer to “Types of User-Defined Fields” on page 67.

➤ To modify a user-defined field or folder

1. In the **Name** column, click the user-defined field or folder you want to modify.
2. Modify the properties as required and click **Save**.

➤ To delete a user-defined field or folder

1. Select the user-defined field or folder you want to delete and click the **Delete** button.
2. Click **OK** to confirm that you want to delete the field or folder.

➤ To create a copy of a user-defined field

1. Select the field you want to copy and click the **Save As** button.
2. Edit the field information as required and click **Save**.

➤ To add an item to a table user-defined field

1. Select the table user-defined field you want to add an item to and click the **Items** button. The Set Up Items dialog box opens.
2. Click the **Add Item** button. The Add a Table Item dialog box opens.
3. Type a name for the table item.
4. If required, select the **Set to Hidden** option.
5. In the **Requested by** field, select the name of the user who requested the item creation.
6. Click **Save**.

ⓘ If a table item is set to hidden, you can hide it from the Edit/View Value dialog box. (For a single-value table, hide the item by selecting Hide Hidden Items in the Value drop-down list. For a multivalue table, hide the items by deselecting the Show hidden items option.)

➤ To modify an item in a table user-defined field

1. In the Set Up Items dialog box, click the item you want to modify in the **Item name** column.
2. Modify the properties as required and click **Save**.

➤ To delete an item from a table user-defined field

ⓘ To select a table item, click in the row containing the item (in the Requested by, Created Date and Time, or Creator column).

1. In the Set Up Items dialog box, select the item you want to delete.
2. Click the **Delete** button.
3. Click **OK** to confirm that you want to delete the item.

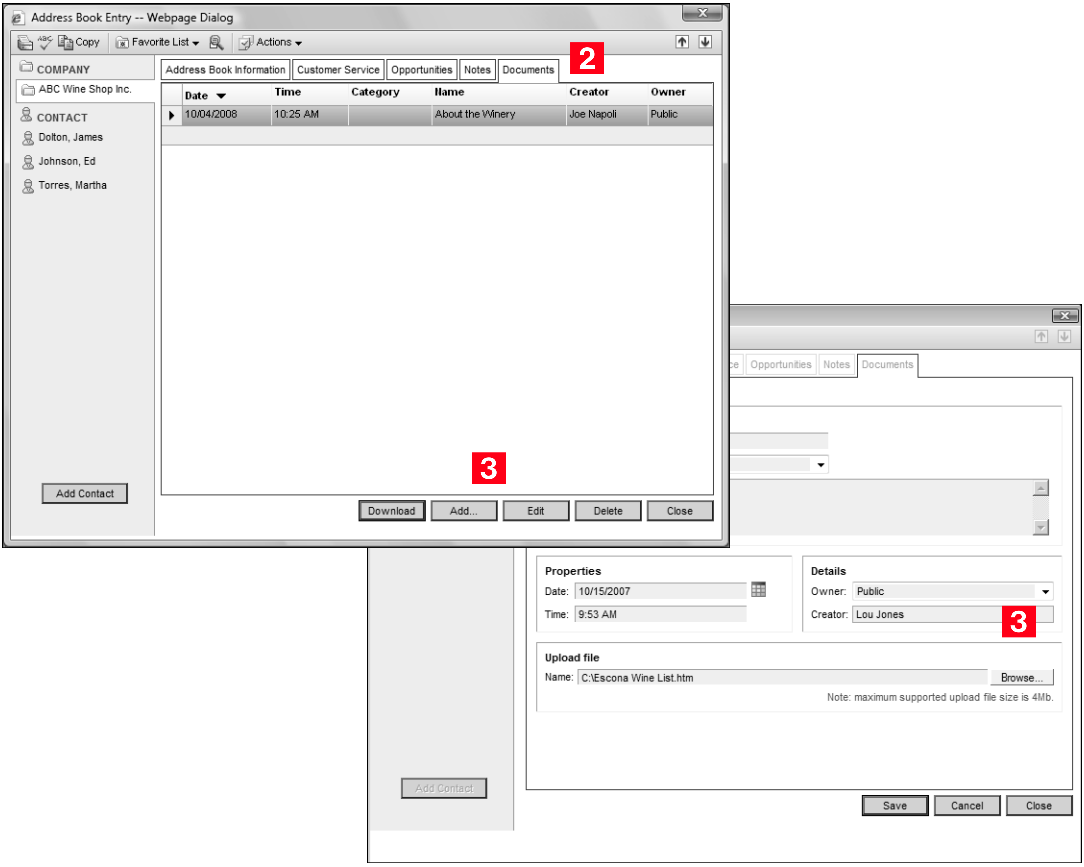
Working with Documents

You can work with documents in Maximizer Web Access in many of the same ways as in Maximizer. For information on working with documents in Maximizer, see ‘Working with Documents and Templates” on page 125.

You can view, add, modify, and delete documents from the Documents tab of an Address Book entry, customer service case, or opportunity.

➤ To view, add, modify, or delete a document

1. If necessary, first run a **search** to locate the associated Address Book entry, customer service case, or opportunity.
2. Open the entry by clicking on it and click the **Documents** tab.
3. View, add, modify, or delete a document as follows:
   - To view the contents of a document, click on the **Download** button while the document is selected. This downloads the document from Maximizer Web Access.
   - To add a document, click **Add** in the **Documents** tab, enter the document properties such as the document name, category, and description, and click the **Browse** button to browse to the document file. Click **Save** on the **Add document** page to complete the process.
   - To modify a document, first make your changes to the document off-line and save it to a network location or your local drive. Then, click **Edit** in the **Documents** tab and click the **Browse** button to browse to the modified document. Alternatively, you can click the Download button, make your modifications, and then click the Edit button to browse to the document.
   - To delete a document, select the document in the **Documents** tab and click **Delete**.


Address Book Entry -- Webpage Dialog
Copy
Favorite List
Actions
COMPANY
ABC Wine Shop Inc.
CONTACT
Dolton, James
Johnson, Ed
Torres, Martha
Address Book Information
Customer Service
Opportunities
Notes
Documents
2
Date
Time
Category
Name
Creator
Owner
10/04/2008
10:25 AM
About the Winery
Joe Napoli
Public
3
Add Contact
Download
Add...
Edit
Delete
Close
Opportunities
Notes
Documents
Properties
Date: 10/15/2007
Time: 9:53 AM
Details
Owner: Public
Creator: Lou Jones
3
Upload file
Name: C:\Escona Wine List.htm
Browse...
Note: maximum supported upload file size is 4Mb.
Add Contact
Save
Cancel
Close

View Documents in the Company Library

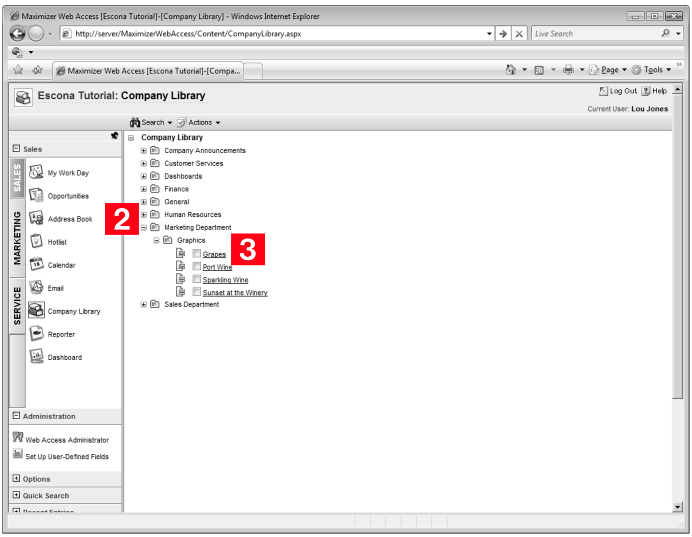
You can view documents from the Company Library in Maximizer Web Access.

Not all document types can be opened in Maximizer Web Access, even if they can be opened in Maximizer. Only the following types of documents can be opened:

- .DOC and .RTF files – Microsoft Word
- .XLS files – Microsoft Excel
- .PPT files – Microsoft PowerPoint
- .HTM and .HTML
- .BMP files – bitmaps
- .TXT files – text and Company Library notes
- .JPG, .GIF, and .TIF files – graphic files
- .PDF files – Adobe Portable Document Format files

➤ To view documents in the Company Library

1. To view Company Library documents, click the **Company Library icon** in the icon bar. Maximizer Web Access displays the same tree-type folder view as Maximizer.
2. To expand a folder, click on the **plus sign** shown on the left side of the folder.
3. Click a document to download it.



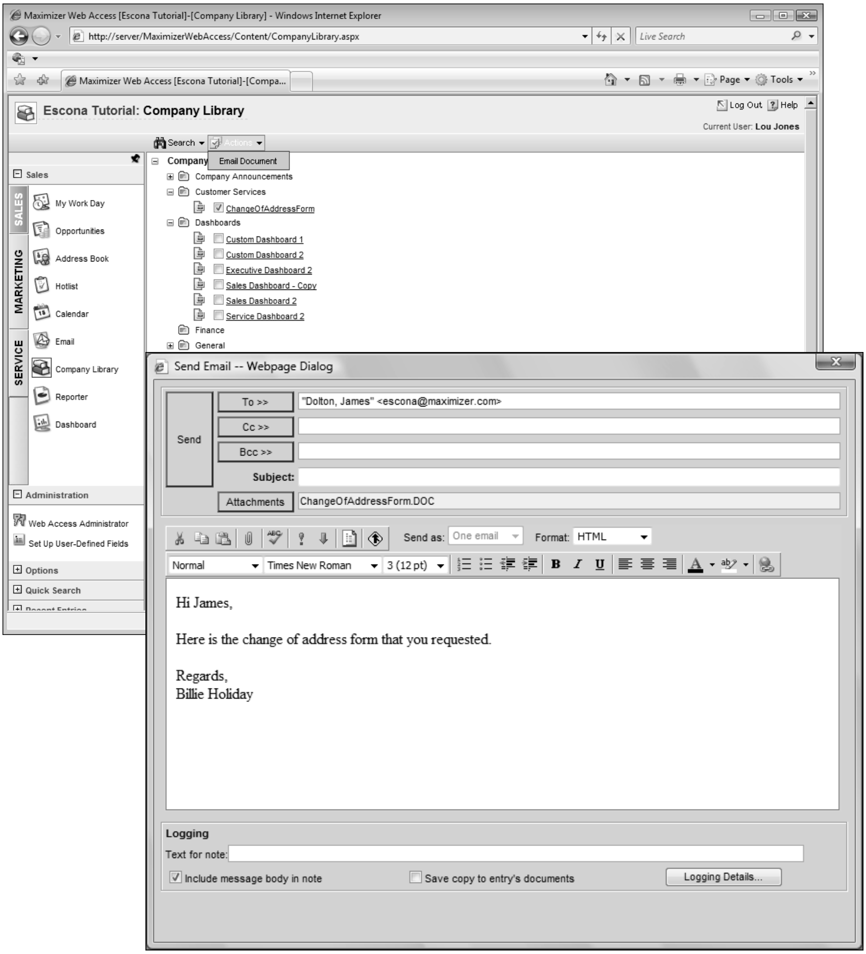
Send Documents by Email from the Company Library

You can easily send documents by email from the Company Library.

➤ To send documents by email from the Company Library

1. In the Company Library, select the documents you want to send.
2. Select **Email Selected Documents** from the **Actions** menu.

   The Send Email dialog box appears with the selected documents attached to the email message.
3. Enter the details of your email message.
4. Click **Send**.



Work with Microsoft Word


Open MS Word button on the Address Book page

You can use Microsoft Word as your word processor while working with Maximizer Web Access. You can launch Word directly from your Address Book with the Open MS Word button.

Word integration installs a Maximizer Web Access toolbar menu in Word. The options in the Maximizer Web Access toolbar menu integrate Address Book entries in Maximizer Web Access with Word. This toolbar menu is different from the Maximizer toolbar, which integrates with Maximizer and not with Maximizer Web Access.

You can use the Maximizer Web Access toolbar menu to do the following:

- **Insert merge fields in a document** – For information on using merge fields, see “Use Merge Fields in Document Templates” on page 129.
- **Merge a document** – This option updates the merge fields in the current document to reflect values in the selected Address Book entry.
- **Send a document** – This option merges the document with the values in the selected Address Book entry and sends the document to the printer.

Set Up Word Integration

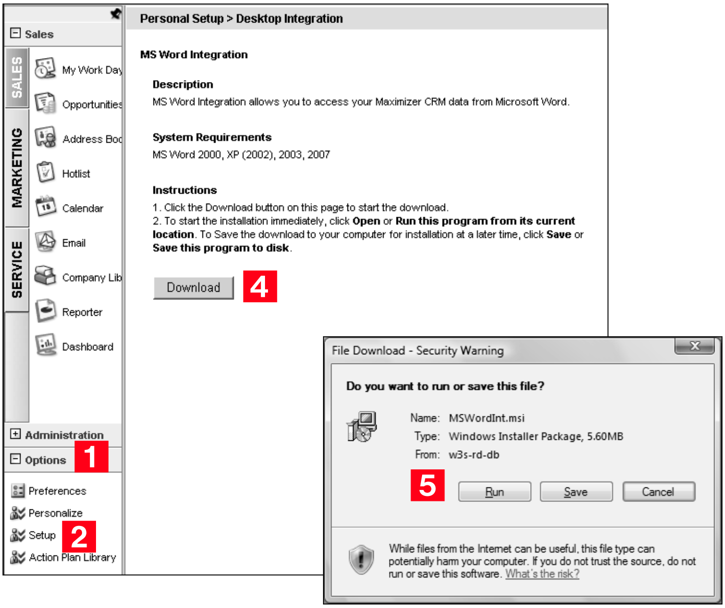
This setup involves downloading Active X controls, which may be disallowed on some networks. Word integration can also be installed from the Maximizer CRM CD. For more information, see the *Maximizer CRM Administrator’s Guide*.

If Word integration is enabled, you can set up Word integration directly from Maximizer Web Access. For information on enabling Word integration, see the *Maximizer CRM Administrator’s Guide* or your system administrator.

➤ To set up Word integration

1. In the left-hand navigation bar, click the plus sign to expand the **Options** section.
2. In the **Options** menu, select **Setup**. The Personal Setup page opens.
3. Select **MS Word Integration**. The **Personal Setup > Desktop Integration** page opens describing the basic steps required to install the files.
4. Click **Download**. A window opens asking if you want to run or save the file.

5 Click **Run** and follow the steps outlined in the setup wizard to install the files.



This setup includes the installation of the MS Office Integration for Maximizer CRM Web Access add-in. Next time you run Word, you may be asked whether or not you want to enable macros that were installed. Select the "Always trust macros from this source" option and click the Enable Macros button.

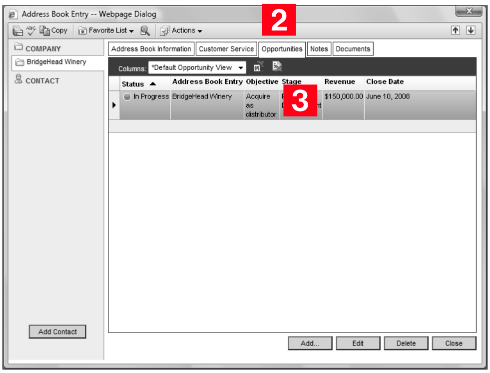
Working with Opportunities

Opportunity revenue can be displayed in multiple different currencies other than the default currency for an Address Book. See chapter 5 "Managing Opportunities" on page 163 for more information.

From the Opportunities page in Maximizer Web Access, you can view, edit, and add opportunities in your Address Book.

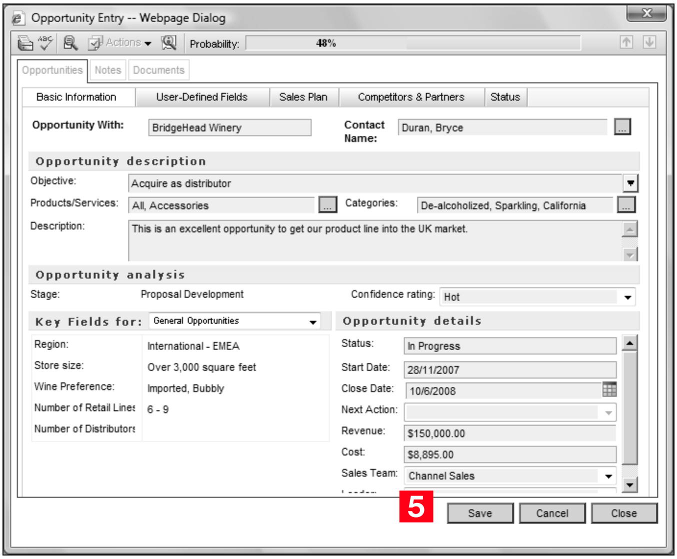
➤ To view or modify an opportunity for an Address Book entry

1. If necessary, first run a search to locate the Address Book entry associated with the opportunity.
2. Open the entry by clicking on it and click the **Opportunities** tab. All of the opportunities for the selected entry are displayed in the list.
3. Open any of the associated opportunities in the list by clicking on the opportunity.

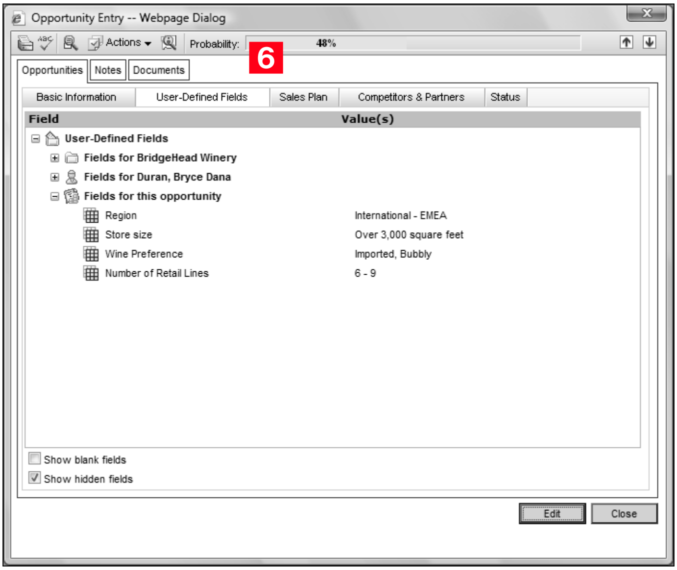


4. You can edit all of the associated opportunity information by clicking **Edit**.

5 If you are modifying an opportunity, make your changes and click **Save**. Clicking Cancel does not save any changes you have made. Clicking Close returns you to the Address Book page.



6 You can also view associated information such as user-defined fields, the opportunity's competitors/partners, and the opportunity status by clicking on the corresponding tab.



View All Opportunities

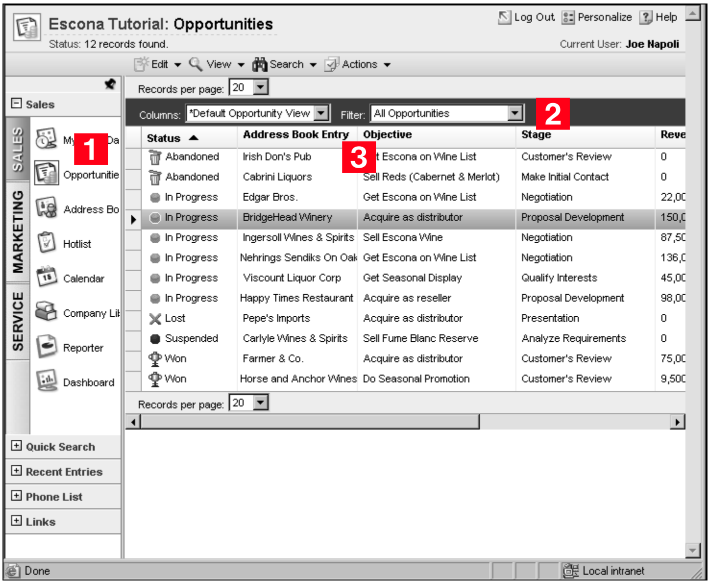
ⓘ Opportunities are displayed chronologically.

➤ To view all opportunities in the Address Book

1 You can view all opportunities in the Address Book by clicking the **Opportunities** icon. All current opportunities in the Address Book appear.

2 To view opportunities of a specific type, use the **filter** drop-down list to narrow the list.

3 To view an opportunity's details, click on the **opportunity**.



Add and Delete Opportunities

You can add and delete opportunities just as you are able to in Maximizer.

➤ To add an opportunity

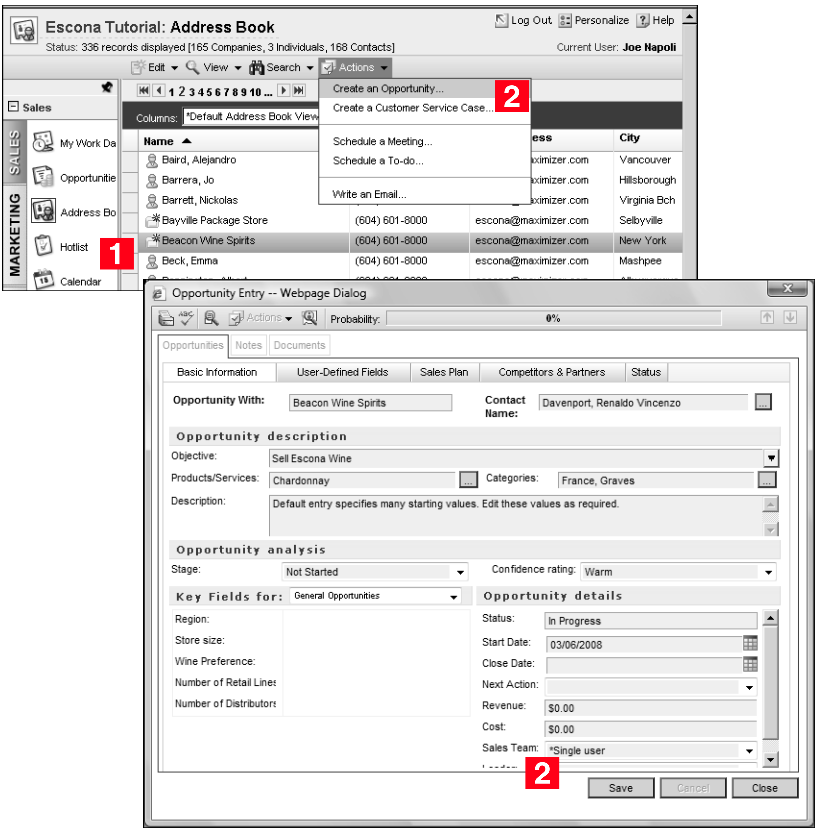
1. In the Address Book page, select or open the Address Book entry you wish to be associated with the opportunity. Select **Actions > Create an Opportunity**.

   – or –

   In the Opportunities page, select an opportunity that is already scheduled with the Address Book entry. Select **Edit > Add Opportunity**.

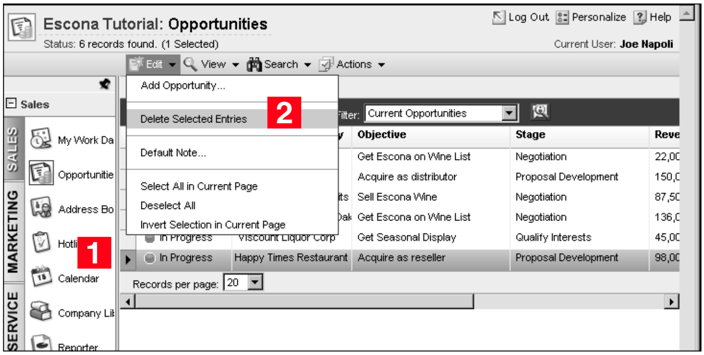
2. Enter the opportunity details. Click **Save** when you are finished.

For information on displaying products/services and categories in the opportunity, see Maximizer Web Access Help.



➤ To delete an opportunity

1. In the Opportunities page, select the opportunity.
2. Click the **Edit** button and select **Delete Selected Entries**.



For more information on working with opportunities and opportunity strategies, see “Managing Opportunities” on page 163.

Apply Strategies to Opportunities

Once you have strategies set up in Maximizer, you can apply them to opportunities. The process in Maximizer Web Access is very similar to how it works in Maximizer.

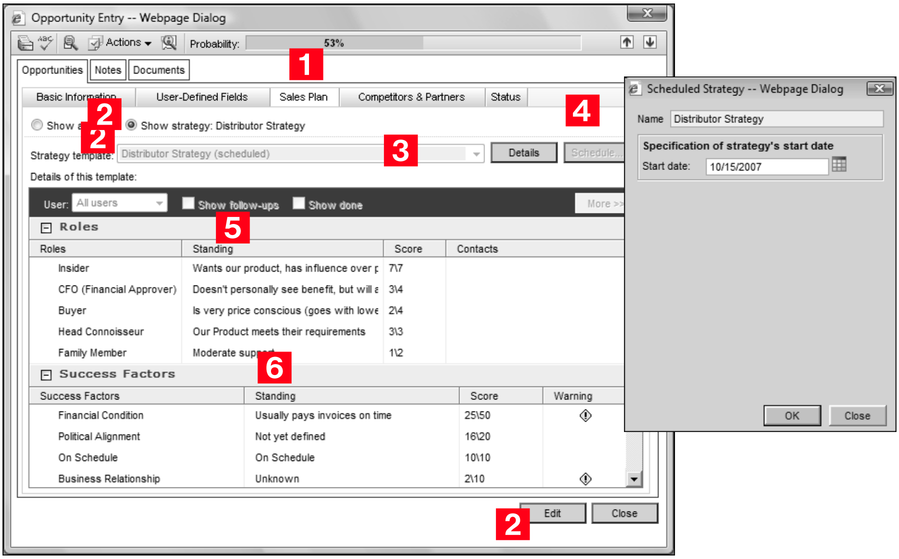
➤ To apply a strategy to an opportunity

1. Open the opportunity and click the **Sales Plan** tab.
2. Select the **Show strategy** option and click **Edit**.
3. Select a strategy from the **Strategy template** drop-down list.

   You can click the **Details** button to view specific properties of the strategy such as the description and cost.
4. Click the **Schedule** button and specify the **Start date** for applying the strategy. Click **OK** to return to the Sales Plan tab.
5. Select a **role** and click in the **Standing** column to choose a standing for the role. You can also select a **Contact** for the role if necessary by clicking inside the **Contact** column when a role is selected.
6. Select a **success factor** and click in the **Standing** column to choose a standing for this success factor. Note that the “On

ⓘ For detailed information on how roles, success factors, and steps determine the probability of closing an opportunity in relation to their weighted scores and standings, see “Designing Strategies for Your Opportunities” on page 166.

Schedule" and "Political Alignment" success factors are calculated automatically.



7 Select a **step** and click the **plus sign** to view all activities for this step.

You can use the **More** button to add, modify, or delete roles, success factors, steps, and activities.

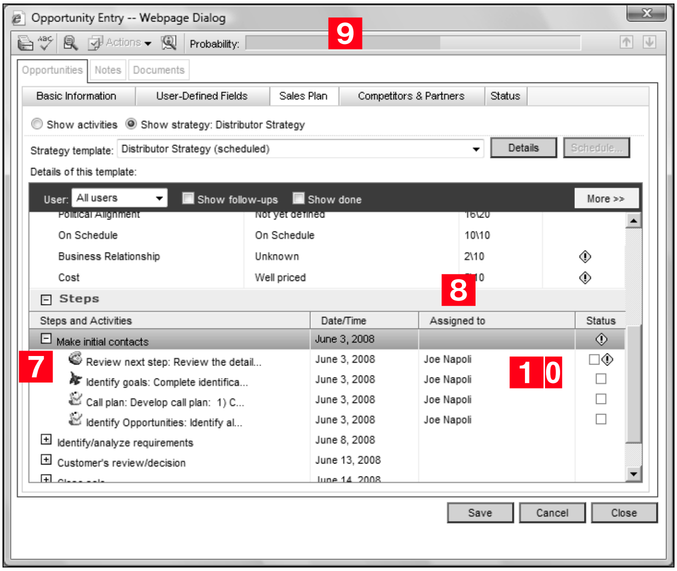
8 If you have a team assigned to an opportunity, you can delegate team members to specific activities in a step. Click on an **activity** and choose a **user** from the **Team member responsible for completion** drop-down list.

9 Update the strategy application as **roles** become more influential, **success factors** change, and **steps** are completed. The **progress indicator** will change automatically in alignment with the success of the opportunity.

10 To mark an activity as complete, click inside the **box** displayed after the activity. Overdue activities are denoted by a warning symbol after the activity.

Use the **Show follow-ups** option to display follow-up activities related to an activity within a step. Use the **Show done** option

to display completed activities. (Otherwise, completed activities are removed from the step.)



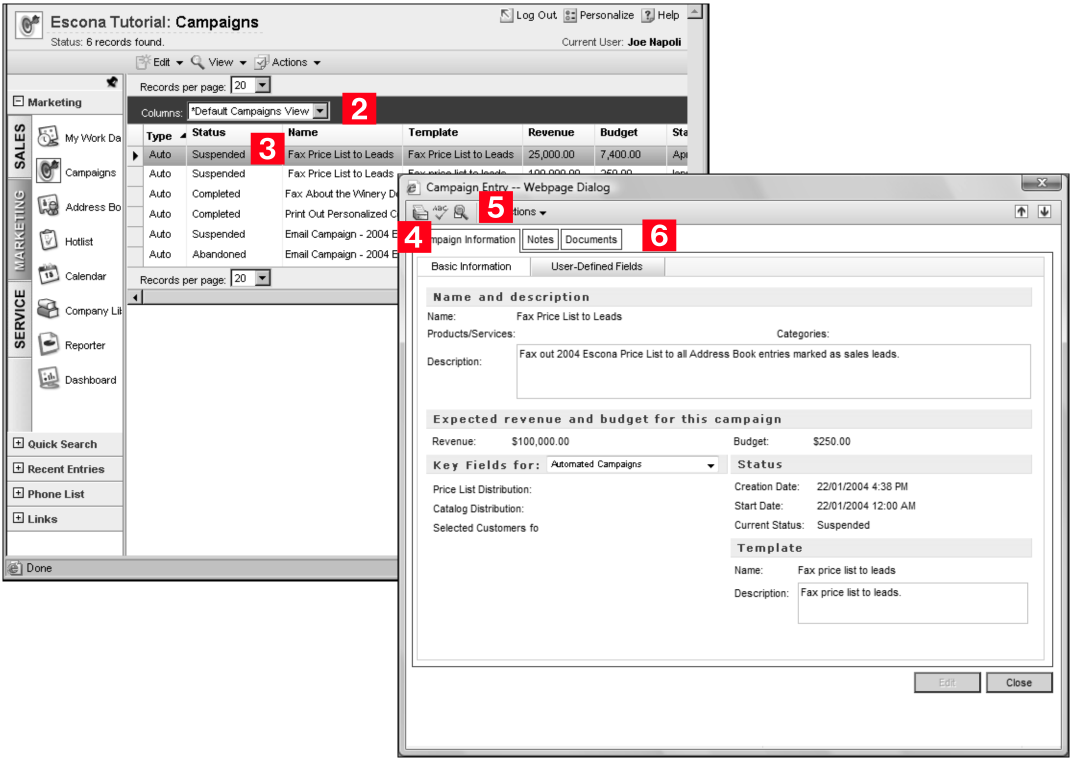
Working with Campaigns

You can view all campaigns in Maximizer Web Access as well as modify campaign notes and documents.

➤ To view campaigns

1. Open the Campaigns page by clicking on the **Campaigns** icon while the **Marketing** tab is selected.
2. Select a **column setup** and specify the number of **records per page** if necessary.
3. Open a campaign by clicking on it.
4. Click the **Print** button to print the campaign details.
5. Click the **Properties** button to see the campaign creation details.
6. Click the corresponding tab to view the campaign's **user-defined fields**, **notes**, and **documents**.

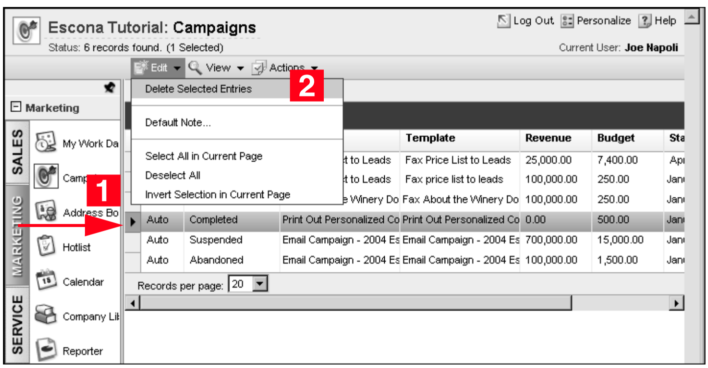
You can add, modify, and delete notes and documents.



➤ To delete a campaign

1 In the Campaigns page, select the campaign by clicking in the box on the left of the campaign.

2 Click the **Edit** button and select **Delete Selected Entries**.



Create One-Time Campaigns

In Maximizer Web Access, you can create one-time Automated email campaigns from the Address Book page.

Merge fields are not supported when you create a one-time campaign from the Email page or when you send a campaign to multiple recipients as one email message.

➤ To create a one-time campaign

1. In the Address Book page, select all of the Address Book entries to receive the email campaign.
2. Select **Actions > Write an Email**.
3. In the **Send As** drop-down box, select **Separately**.
4. Compose the text of the email message. You can compose the email message in HTML or in plain text. You can use the formatting toolbar to apply additional formatting to the email text.
5. Click the **Insert Fields** button to insert merge fields in your template. Note that only basic merge fields are available for this type of campaign—campaign merge fields as described in chapter 6 "Managing Campaigns" are not supported with this type of campaign.
6. Click the **Email Template** button.
7. In the **Email Templates** dialog box, click **Add** to add a new email template. Enter a name and description for the template and click **OK**. Click **Close** to return to the email message.

   To reuse this template in the future, select the template in the Email Templates dialog box, and click Retrieve.
8. Enter a subject for the email message, and click **Send**. Optionally, you can choose logging options to save the email message in the entries' notes or documents.

Working with Customer Service Cases

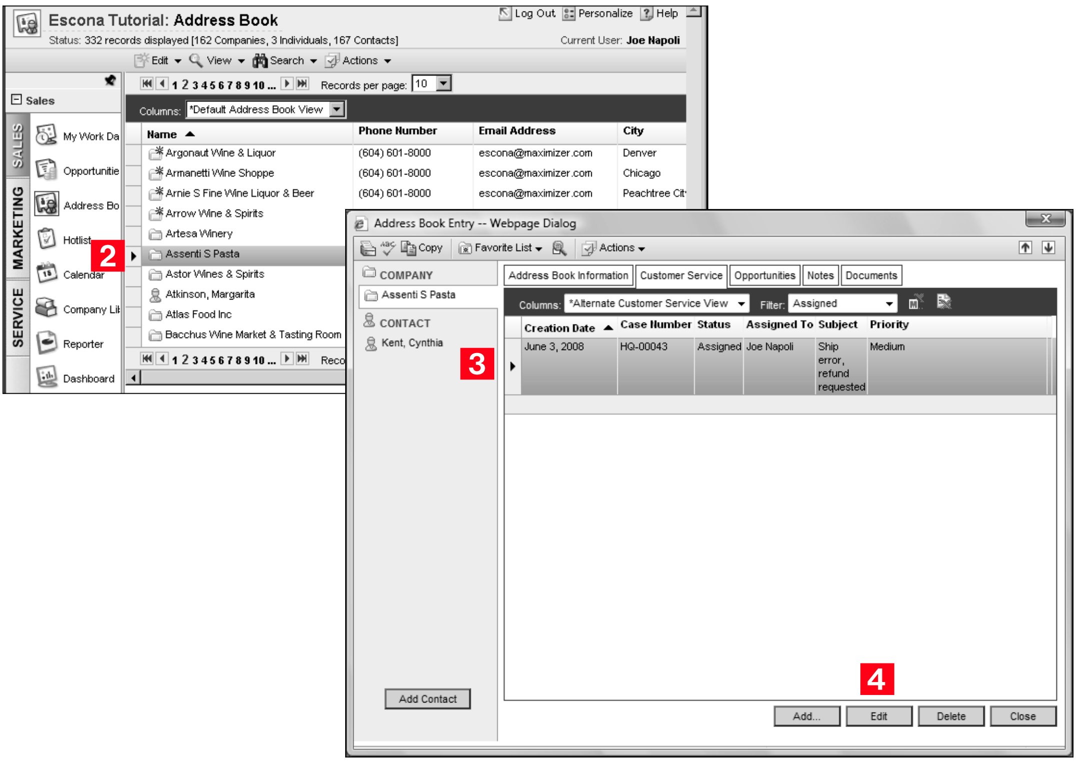
You can view, add, modify, and delete customer service cases in the Customer Service page of Maximizer Web Access.

View Cases

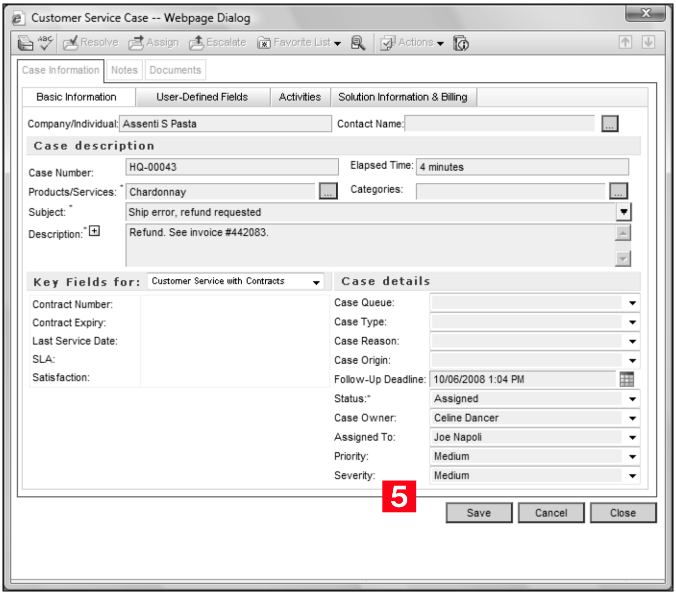
To search for cases, select All Fields from the Search menu and then specify a case field as part of the search criteria.

➤ To view or modify a customer service case for an Address Book

1. If necessary, first run a **search** to locate the Address Book entry associated with the customer service case.
2. Open the entry by clicking on it and click the **Customer Service** tab. All of the customer service cases for the selected entry are displayed in the list.
3. Open any of the associated cases in the list by clicking on the **case**.
4. To modify the case, click Edit.



5 If you are modifying a case, make your changes and click **Save**. Clicking Cancel does not save any changes you have made. Clicking Close returns you to the Address Book page.



6 You can also view the associated user-defined fields by clicking on the corresponding tab.

➤ To view all customer service cases in the Address Book

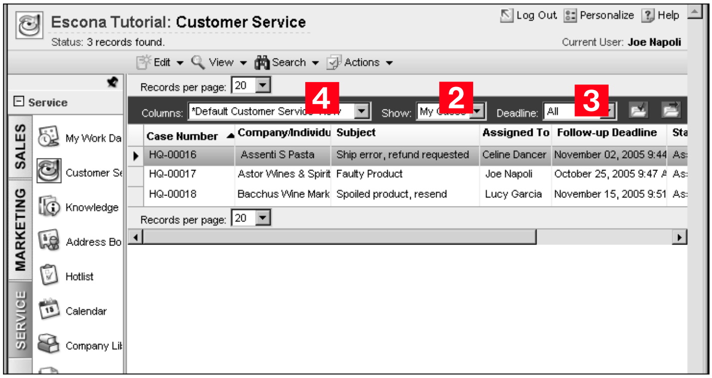
Overdue cases (those that are past their follow-up date) are shown in red text.

1 You can view all customer service cases in the Address Book by selecting the **Service** tab and clicking the **Customer Service icon**.

2 By default, only unresolved cases assigned to you appear in the list. To view all cases in the Address Book, select **All Cases** in the **Show** drop-down list. To view only cases in a specific case queue, select a **case queue** (e.g., Contract, Priority, or Standard) from the **Show** drop-down list.

3 To filter cases by their follow-up date, choose one of options from the **Deadline** drop-down list. For example, you can choose to view only cases with a follow-up date of Today. Or, choose the Custom option to specify a start date and end date to filter cases by date range.

4 Select a **column setup** from the **Columns** drop-down list to adjust the view of the displayed case fields. Click on a case to open it.



Add Cases

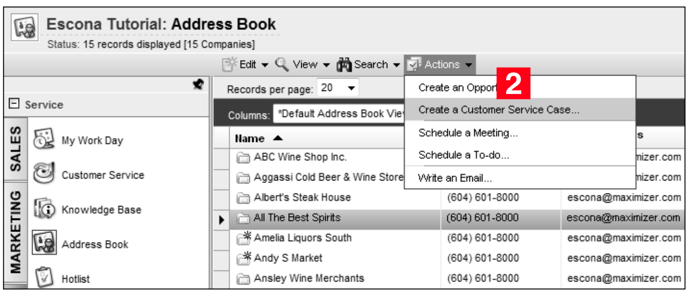
You can add customer service cases in a number of different ways. Following are two methods of adding a case.

➤ To add a customer service case from the Address Book page

1 In the Address Book page, select or open the Address Book entry you wish to be associated with the case.

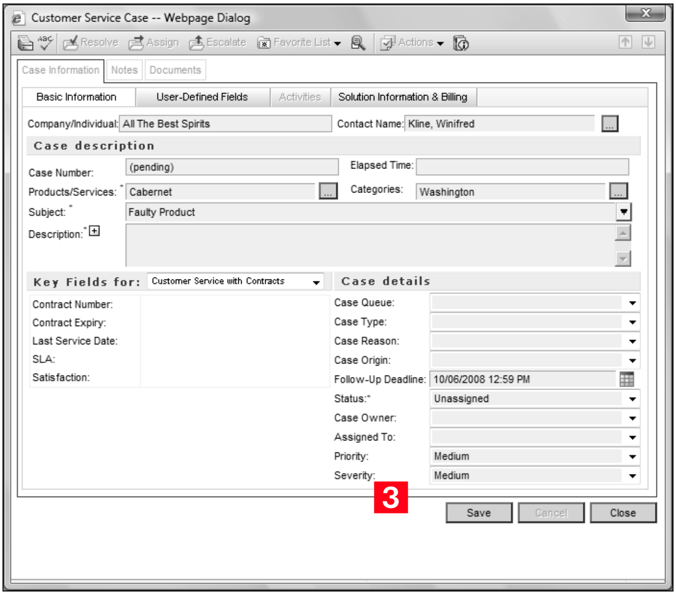
2 Click the **Actions** button and select **Create a Customer Service Case**.

You can also create a case from the Customer Service window by clicking the Edit button and selecting Create a Customer Service Case.



For information on displaying products/services and categories in the case, see Maximizer Web Access Help.

3 Enter the case details. Click **Save** when you are finished.



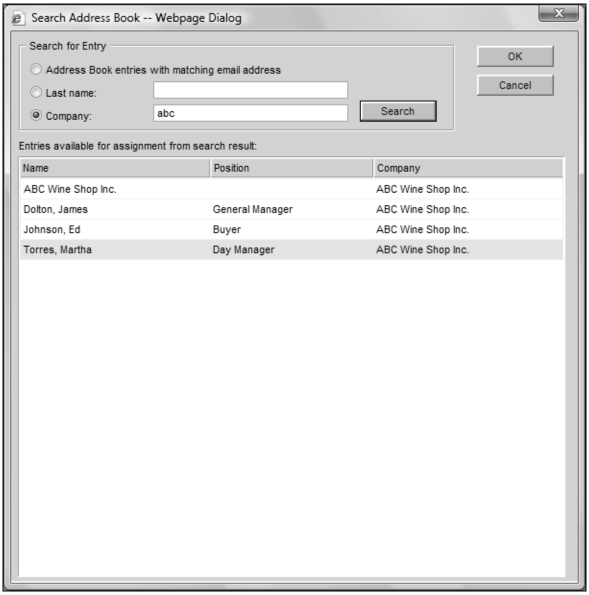
➤ To add a case associated with an email message

1 In the Email page, select the email message that is associated with the Address Book entry for which you are adding the case.

2 Select **Actions** > **Create Customer Service Case from Current Email Message**.

3 If there is an associated Address Book entry for the selected email message, it is displayed in the **Entries available for assignment from search results** list. Select the Address Book entry in the **Search Address Book** dialog box. If necessary, first

enter the search criteria to find the Address Book entry and click the **Search** button.



4 Enter the case details. Click **Save** and then **Close** when you are finished.

5 The **Add Email to Customer Service Case** dialog box appears prompting you to save the email message as a document for the case. Click **OK** to save the message as a document. Click **Cancel** if you do not want to save the message as a document for the case.

You can later view the email message from this tab.

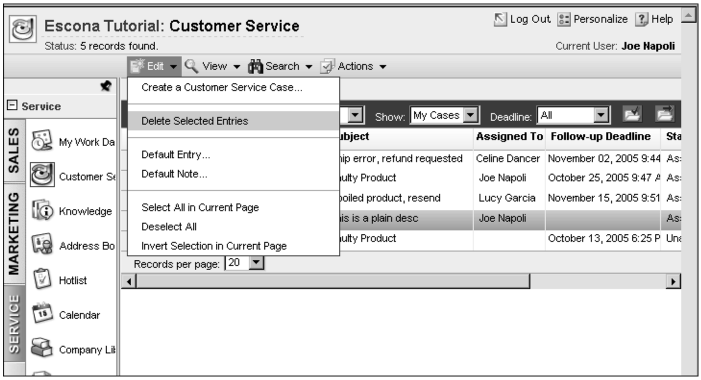
Delete Cases

➤ To delete a case

1. In the Customer Service page, select the case by clicking on the grey box on the left of the entry (first column).

See chapter 7 "Providing Customer Service" on page 219 for more information on how to perform other common tasks related to customer service.

2. Click the **Edit** button and select **Delete Selected Entries**.



Case resolution, assignment, escalation, and monitoring in Maximizer Web Access operate very similar in Maximizer.

Case Notification from Maximizer Web Access

Case notification for both users and Address Book entries is available in Maximizer Web Access when a case is created, modified, assigned, resolved, or escalated to a user. Custom templates for case notification email can also be set up in Administrator.

For more information about case notifications, see "Sending Automatic Email Notification about Cases" on page 237 and, if necessary, the *Maximizer CRM Administrator's Guide*.

Working with the Knowledge Base

Access to the knowledge base is very similar to when you are using Maximizer. You can view, modify, add, and delete articles using Maximizer Web Access.

For more information about knowledge base articles and knowledge article statuses, refer to "Record Case Solutions" on page 241.

View, Add, Modify, and Delete Articles

➤ To view all knowledge base articles

To search for a knowledge base article, click Search and specify a field or phrase.

- To view knowledge base articles, click the **Service** tab and then click the **Knowledge Base** icon in the icon bar.

  Use the **Status** drop-down list to filter the view of articles.

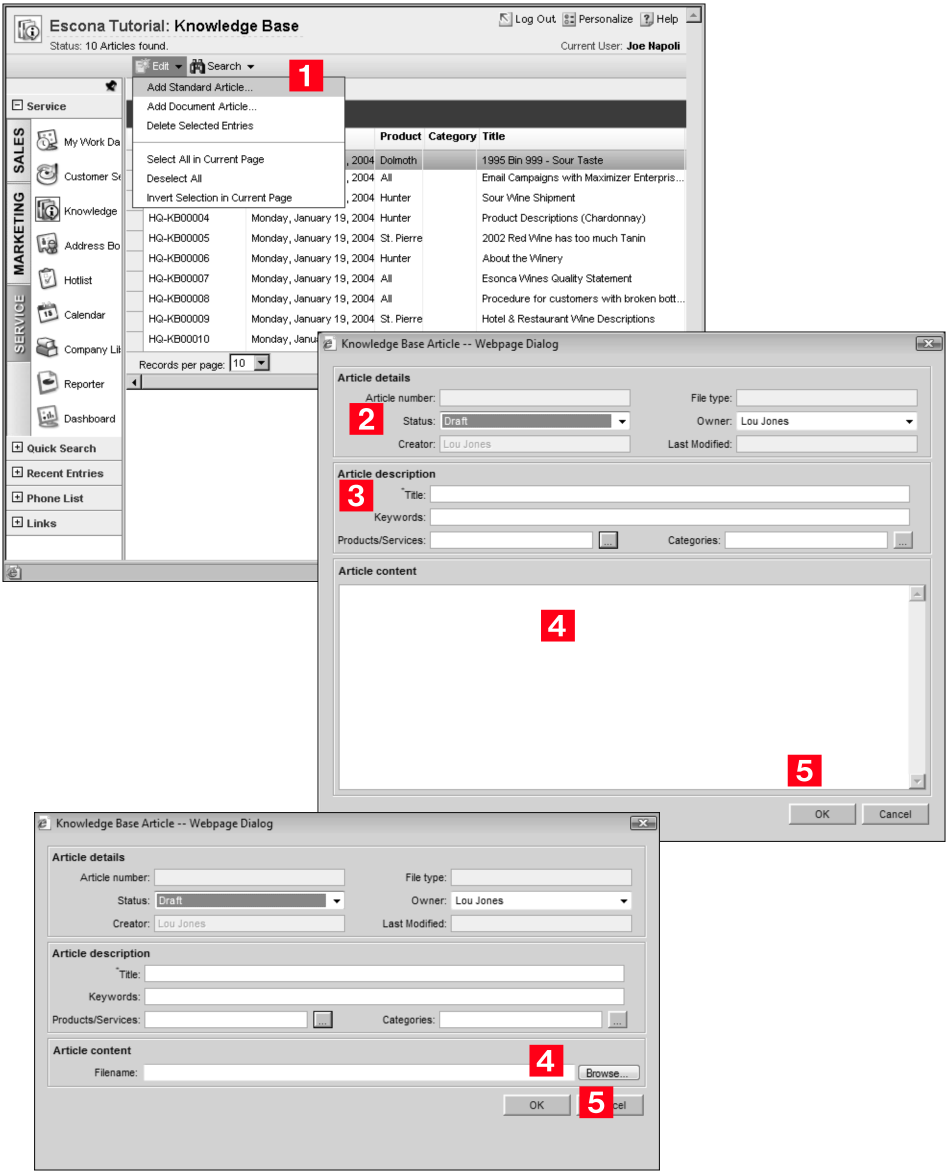
➤ To add a knowledge base article

1. In the Knowledge Base page, click the **Edit** button and choose **Add standard article** or **Add document article**.
2. Choose the article's **status** and **owner**.

   Refer to "Control Who Can Access Articles" on page 243 for more information about article status.
3. Enter the article's **description** field values.
4. If you are adding a standard article, enter the article content in the **Article content** group box.

   If you are adding a Document article, click the **Browse** button to browse to the document file that you have saved on a network location or local drive.

5 Click **OK** when you are finished.



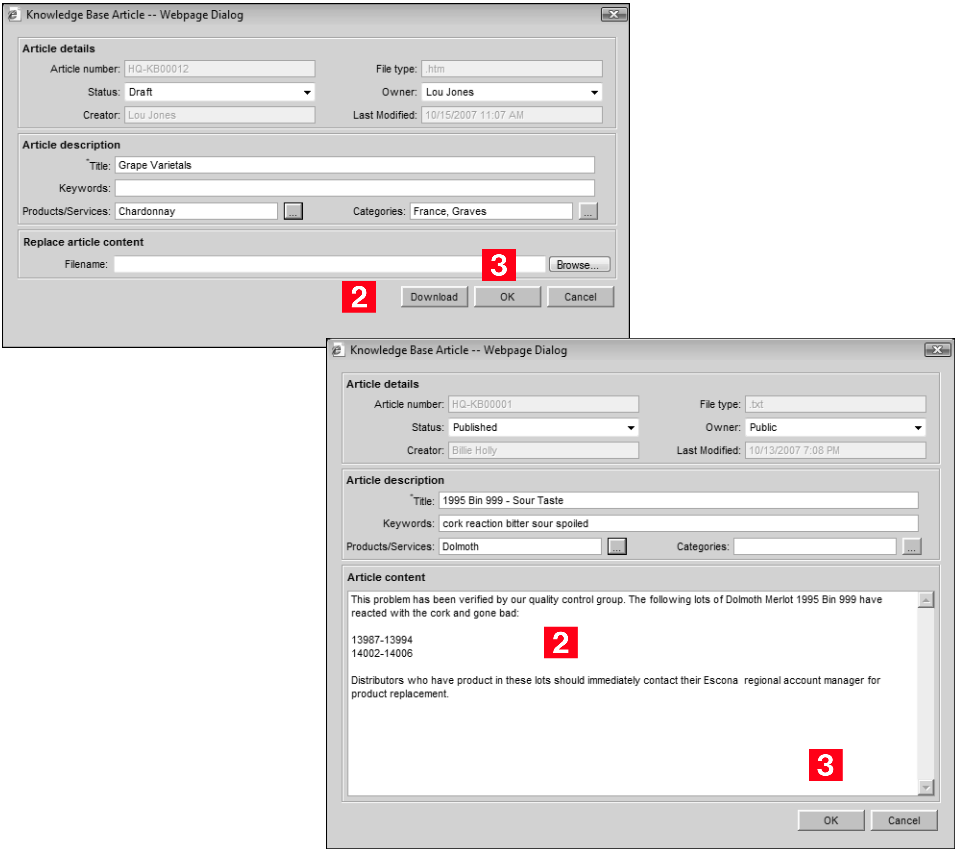
Article numbers are automatically assigned.

For more information on adding articles to the knowledge base, see "Add Articles to the Knowledge Base" on page 242.

➤ To modify a knowledge base article

1. In the Knowledge Base page, click on the **article** to open it.
2. If you are modifying a document article, click the **Download** button, make your modifications to the article, and save it to a network location or your local drive. Then, click the **Browse** button, browse to the location where you have saved the modified article, and select the **file**.

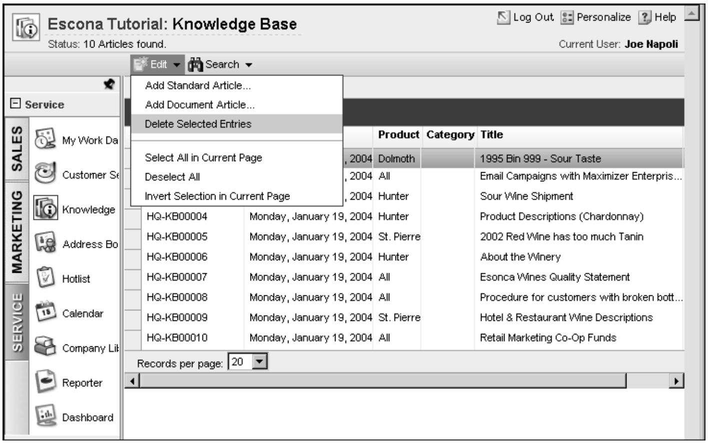
   If you are modifying a standard article, make your changes in the **Article content** group box.
3. Click **OK** when you are finished.



➤ To delete a knowledge base article

1 On the Knowledge Base page, select the article.

2 Click the **Edit** button and select **Delete Selected Entries**.



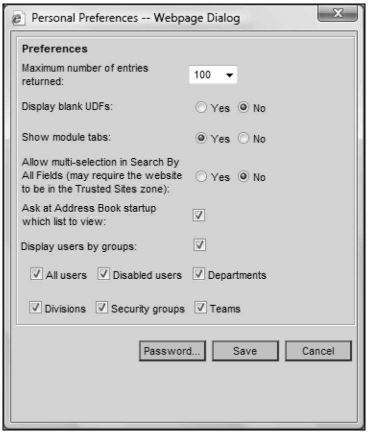
Setting Personal Preferences in Maximizer Web Access

Click the Personalize link in the Options section to set personal preferences for Maximizer Web Access. The preferences you set are applied only to the Address Book that is currently open.

➤ **To set personal preferences**

1. In the left navigation pane, click the plus sign beside **Options** to expand the section.
2. Click the **Personalize** link. The Personal Preferences dialog box opens. Adjust preferences as required.

Click the Preferences link in the Options section to set user options for Logging, Calendar/ Hotlist, and Email. Changes you make here are also applied to Maximizer Web Access Administrator, Maximizer CRM, and Administrator. See Maximizer Web Access Help for more information.



Maximum number of entries returned

- Select the maximum number of records you want to search. The default number is 500; other options are 100, 1000, or 2000. If you increase the setting, and run Maximizer Web Access on a dial-up Internet connection, it may take considerable time to search for the records.

Display blank UDFs

- Controls if employees can view user-defined fields that are in the Address Book, but do not yet have assigned values. A separate setting controls if user-defined fields are displayed in a tree-view or list-view.

Show module tabs

- Controls the visibility of module tabs (Sales, Marketing, and Service). If the option is selected, all tabs that the user has access to are displayed. If this option is not selected, the tabs are

hidden. Select a module from the drop-down list to display the module's icons.

Allow multi-selection in Search by All Fields (may require website to be in the Trusted Sites zone)

- Allows you to select more than one search criterion when searching by all fields.

Ask at Address Book startup which list to view

See "Choose an Address Book List" on page 266 for information on choosing Address Book lists.

- Allows you to choose an Address Book list to view when you open the Address Book page.

  If you deselect this option, an empty Address Book list is displayed when you open the Address Book page.

Check Address Book size at login.

- Checks whether the Address Book you are logging into is approaching or exceeding the maximum database size.

  This option is only available in Maximizer CRM Group Edition.

Display users by groups

- Allows you to display available users by group in dialog boxes such as Add Appointment.

  If you deselect this option, users will not be displayed by group. There will be only one user-selection list that displays all available users.

  If you select this option, you can also select the groups that you want to include in user selection lists: all users, divisions, disabled users, security groups, departments, and teams.

Password

- Enables you to change your password.

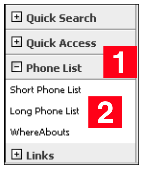
  Under certain operating system configurations, your password may expire after a period of time. In this case, Maximizer will prompt you to change it. For example, it may be required to contain a minimum number of characters. See your system administrator for more information.

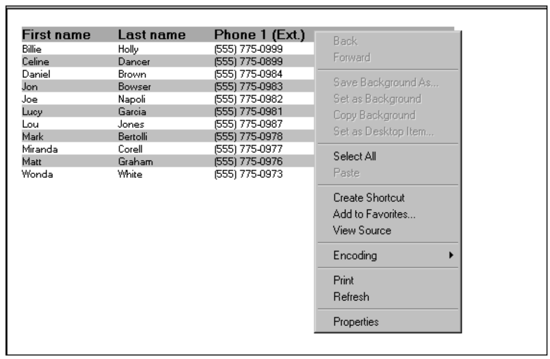
Viewing Company Information

You can view and print out a phone list of for all users in an Address Book. The short form of the phone list includes last names, first names, and phone numbers. The long form also includes the phone numbers listed in the Phone 2 field and email addresses.

➤ To view and print a phone list

1. Expand the Phone List section of Maximizer Web Access by clicking on the plus sign.
2. Click on the **Short Phone List** or **Long Phone List** link.





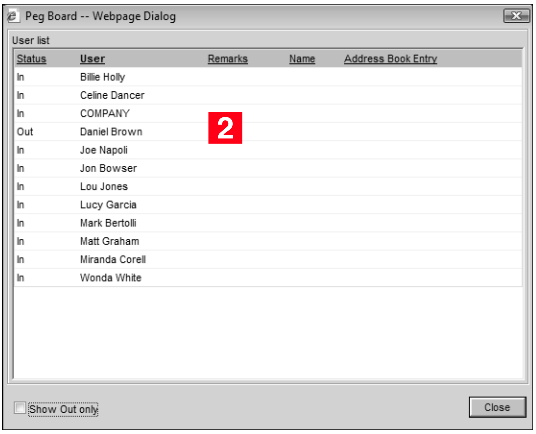
3. If you want to print the phone list, select **File > Print** or right-click and select **Print**.

Check WhereAbouts

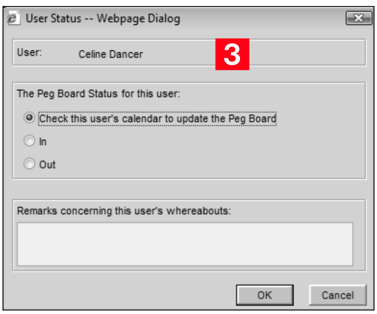
The WhereAbouts section is the same as the Peg Board in Maximizer. At a glance, you can check to see if a specific user is in or if he or she is busy.

➤ To check WhereAbouts

1. Expand the Phone List section of Maximizer Web Access by clicking on the plus sign.
2. Click on the **WhereAbouts** link. A user list appears with a status column indicating if a user is in/out of the office or if the user is busy with an appointment.



3. To change a user's status manually, click on a user name and modify the status for the user.



Dashboard

Before you can access Dashboard, your system administrator must add you to the Dashboard users security group in Administrator.

Available in both Maximizer and Maximizer Web Access, Dashboard provides you with timely information on your company's performance.

Like a car's dashboard, Dashboard's indicators monitor daily activities and events in real time, so you can see at a glance which areas are doing well and which areas need attention. Information such as how many visitors are currently on your website, how many opportunities are in the pipeline, and your daily revenue from online purchases can be accessed instantaneously.

You can add or remove indicators from Dashboard to optimize your monitoring process. For more information on working with Dashboard, see "Working with Dashboard" on page 29, or see Maximizer Web Access Help.

View Dashboard

To display only Dashboard in the My Work Day page, go to Maximizer, select File > Preferences > Overview Page tab, and then deselect the Show Tasks and Appointments and Show Company Announcements checkboxes. You can also deselect these checkboxes in Administrator. (Select File > Users > Preferences > Overview Page tab.)

➤ To view Dashboard from Maximizer Web Access

- Click the **Dashboard icon**. This method displays the Dashboard without the My Work day tab.

  - or -

- Click the **My Work Day** icon and click the **Dashboard** tab.

Partner Access

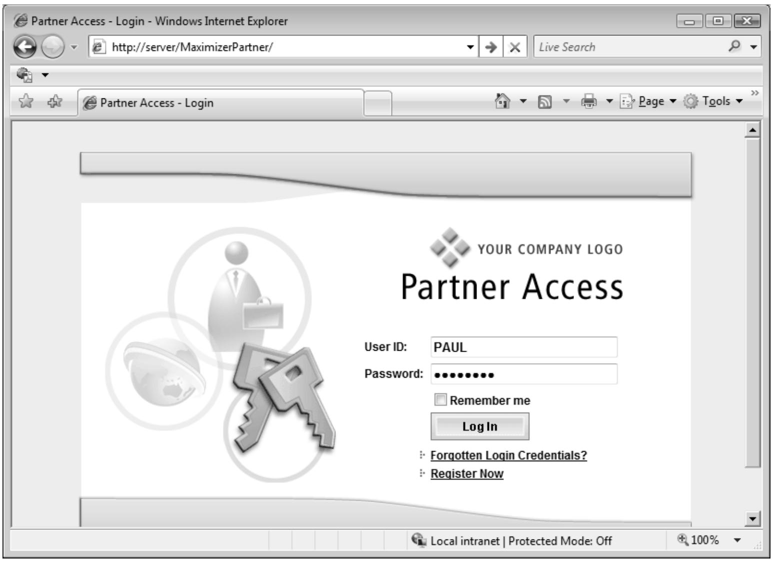
Maximizer users can access the sample Escona Tutorial Address Book using "Paul" as the user ID and "password" as the password.

Partner Access is a web application that creates a two-way flow of information between your organization and its business partners. Organizations with an extended sales force of resellers or dealers need a way to distribute and monitor sales opportunities to these partners. Partner Access allows business partners to access Address Book entries, sales opportunities, customer service cases, and news/events via the web.

Staff can publish news to the site. News items can be filtered for partners based on their interest areas.

Customer service cases may be associated with a Contact of a Company or an Individual. Partners (the Contact associated with the case) can then follow the progress of the case. The knowledge base may also be searched for related articles.

Partners access Partner Access using the URL and setup PIN sent by email by the site administrator. See the *Maximizer CRM Administrator's Guide* for more information about setting up Partner Access.



View and Modify Address Book Entries

Partners can view and modify associated Address Book entries in the site.

➤ To view and modify Address Book entries

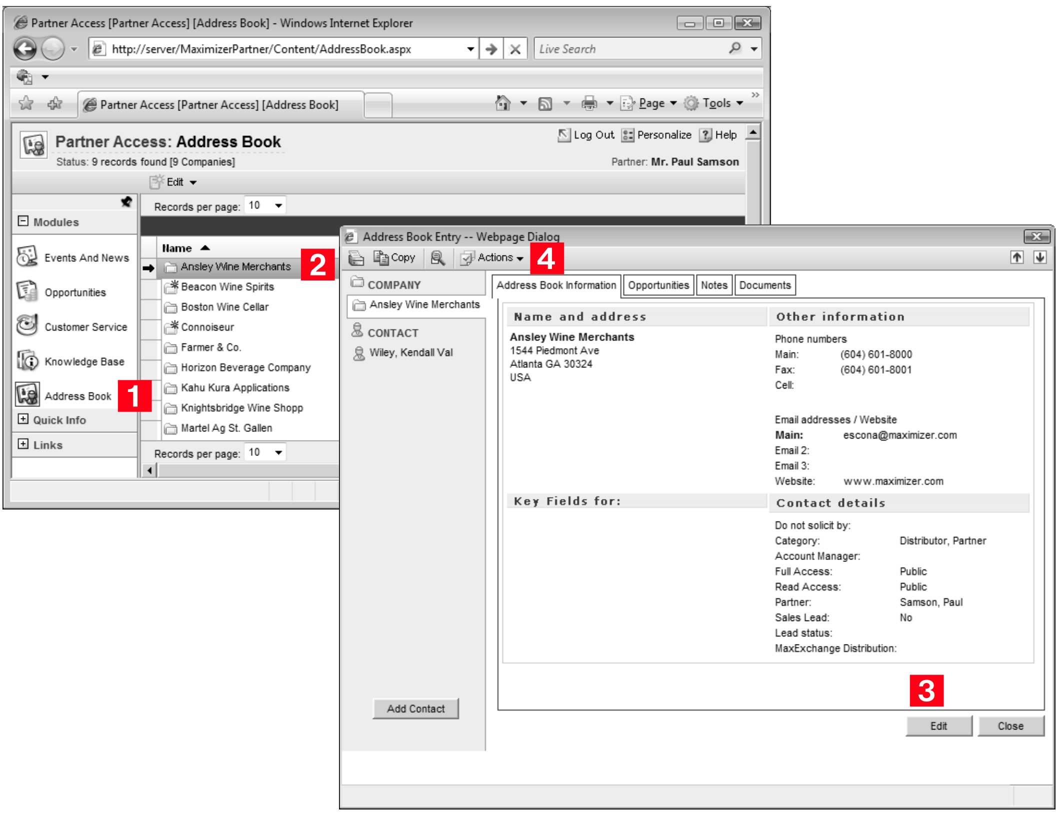
1. In Partner Access, click the **Address Book** icon.

   All the Address Book entries that are associated with a partner appear (these entries have the partner assigned to them in the Basic Information tab of an entry).

2. Click on an **Address Book entry** to open it.

3. Click **Edit** to make modifications to the entry.

4. Use the **buttons** on the menu bar to print a Detailed report, view the properties of the entry, copy information to the Windows clipboard, and create new opportunities.



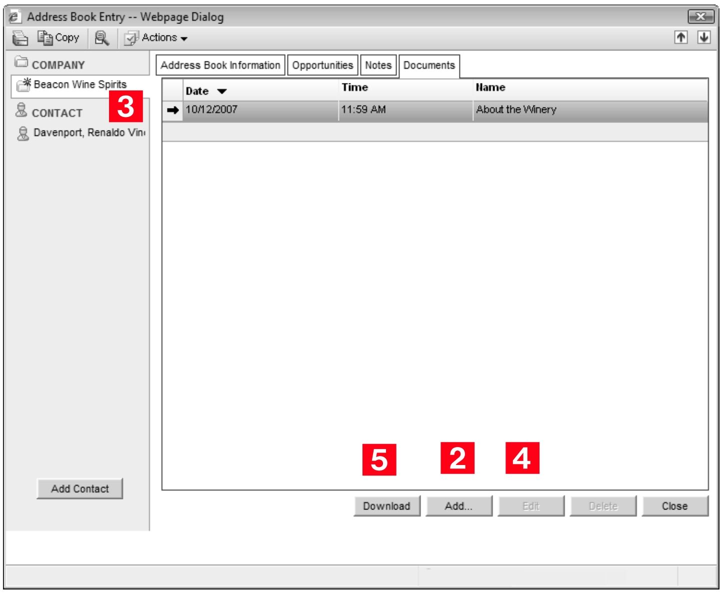
Work with Opportunities, Notes, and Documents

Opportunities are assigned to partners by selecting a partner on the Partner tab of the opportunity. Leads are assigned by assigning the partner to the lead on the Basic Information tab of the Address Book entry. Each time a partner is assigned an opportunity or a lead, the partner is notified by email.

Opportunities, notes, and documents for those Address Book entries can also be created, modified, or deleted (if provided the necessary right to do so). Partners may view and update opportunities that have been assigned to them via Maximizer. Assigned leads are also available to partners.

➤ To add and modify opportunities, notes, and documents

1. While an Address Book entry is open, click on the corresponding tab—**Opportunities**, **Notes**, or **Documents** tab.
2. Click **Add** to add a new opportunity, note, or document.
3. To open an **opportunity**, a **note**, or a **document**, click on it.
4. To edit an opportunity, a note, or document, click the **Edit** button.
5. Use the **Download** button to open a document.



Work with Customer Service Cases

Partners can view and enter cases in Partner Access. Cases can be limited by the site administrator to only those cases associated with the partner or to all cases in an Address Book.

➤ To view and enter cases

1. Open the Customer Service page by clicking on the corresponding icon.
2. To add a case, click **Edit** and choose **Create a Customer Service Case**. A **wizard** appears where you enter the case details.
3. To open a case, click on it.
4. To print a **detailed report** of the case, view the case **properties**, or view a **knowledge base article** associated with a case, click the corresponding button.
5. Click on the **Notes** and **Documents** tabs of a case to see the related notes and documents.

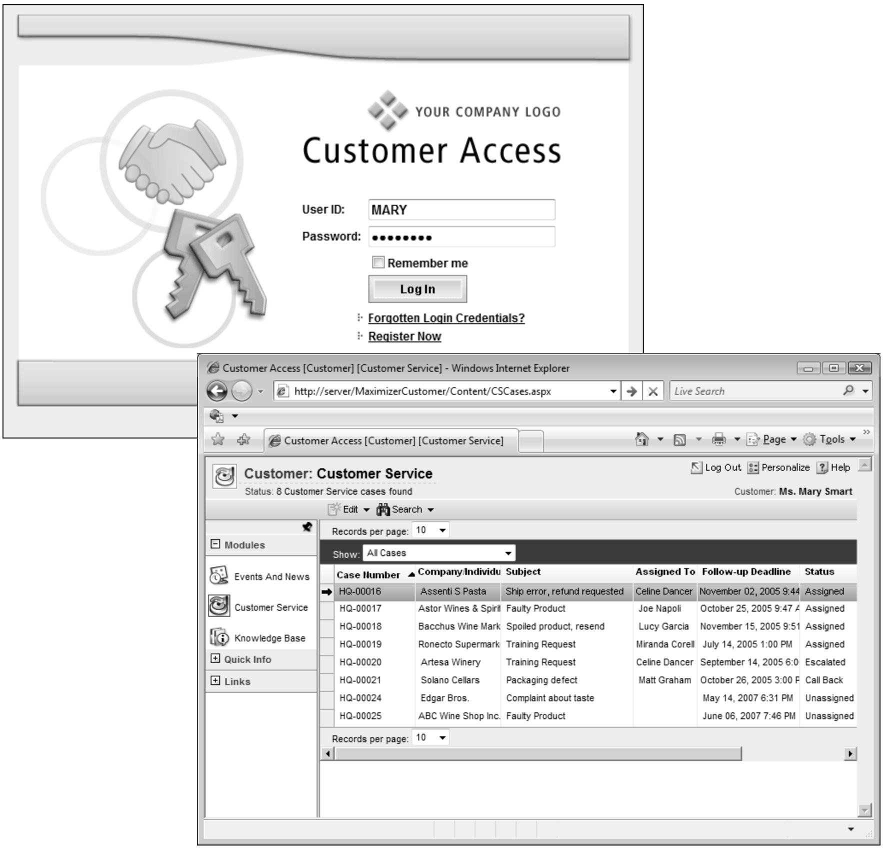
Customer Access

Maximizer users can access the sample Escona Tutorial Address Book using "Mary" as the user ID and "password" as the password.

Customer Access offers customers a number of web-based services. The site's functionality is very similar to Partner Access in that Customer Access can be customized to display information essential to your customers. Staff can publish to the site news such as new products or services; news items can be filtered for customers based on their interest areas.

Customers can follow the progress of their customer service cases and even enter cases if given the proper access rights by the site administrator. The knowledge base can also be searched for related articles. For more information, see "Partner Access" on page 334.

As with Partner Access, customers use the URL and setup PIN sent by email by the site administrator to access Customer Access. They then set up their own login information. See the *Maximizer CRM Administrator's Guide* for more information about setting up Customer Access.



CHAPTER 9

Using Wireless Access

Access Maximizer from Wireless Devices

In this chapter...

"Wireless Access" on page 340

"Accessing Address Book Entries" on page 343

"Modifying Entries" on page 350

"Sending and Saving Email Messages" on page 352

"Accessing Opportunities" on page 354

"Accessing Customer Service Cases" on page 357

"Accessing User-Defined Fields" on page 364

"Accessing Notes" on page 365

"Accessing Documents" on page 367

"Accessing Calendar Appointments and Hotlist Tasks" on page 368

"Accessing the Company Library" on page 373

"Using Favorite Lists" on page 376

"Viewing Dashboard" on page 377

"Setting Wireless Access Preferences" on page 378

Wireless Access

Wireless Access is installed as part of the Maximizer Components for IIS. Check with your system administrator for further information. Instructions for installing, enabling, and configuring Wireless Access are in the *Maximizer CRM Administrator's Guide*.

Wireless Access is a website that lets you access your Maximizer Address Books from wireless devices. You can access the following types of information in Wireless Access:

- Address Book information
- Opportunities
- Customer service cases
- Hotlist tasks and appointments
- User-defined fields
- Notes
- Company Library documents
- Dashboard

Depending on the type of device you are using, the screens and procedures may vary slightly.

Compatible Devices and Browsers

In order for Wireless Access to display properly on devices, you should enable JavaScript and HTML tables in your web browser.

Several devices are compatible with Wireless Access. Check with either Maximizer Software Inc. or your Business Partner for compatibility before deployment. Any HTML web browser is compatible with Wireless Access including the following:

- Go.Web for RIM devices
- Palm Web Pro for Palm devices
- Pocket Internet Explorer for Windows CE devices
- Opera for SmartPhones/PDAs
- Safari for Apple iPhone

Visit the Maximizer website at www.maximizer.com for the most up to date list of supported browsers.

Log In to Wireless Access

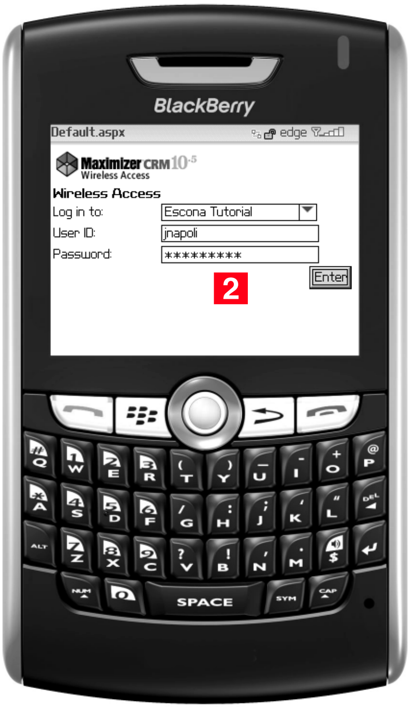
➤ To log in to Wireless Access

1. On your device, enter the URL for the site into your browser as follows:

   <Server Name>/MaximizerWireless

   e.g., http://wirelessweb.maximizer.com/maximizerwireless

2. Select the Address Book, enter your User ID and Password (Maximizer User ID and Password), and then click **Enter**.



The Wireless Access home page appears.

Navigate Pages

From each of the main Wireless Access pages, you can use the navigation footer to move to the Address Book, Opportunity, Customer Service, Calendar/Hotlist, and Company Library pages. You can also use the Back and Home buttons to navigate the site.

You can navigate pages in the following ways:

1. From the Wireless Access home page, click the associated link to access the Address Book, Opportunities, Customer Service, Calendar/Hotlist, Company Library, Dashboard and Preferences pages.

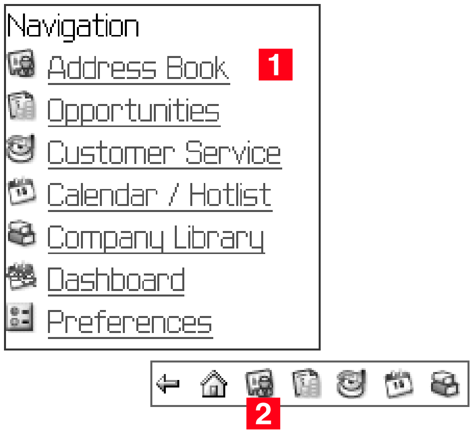
2. From the navigation footer on any of the main pages in Wireless Access, click the **Address Book**, **Opportunity**, **Customer Service**, **Calendar/Hotlist**, or **Company Library** icons.

3. Click the **Back** and **Home** icons to return to a previous page or go to the Wireless Access home page.

Accessing Address Book Entries

You can access the Address Book page in the following ways:

1. From the Wireless Access home page, click **Address Book**.
2. From the navigation footer on the main pages, click the **Address Book** icon.



Search for Address Book Entries

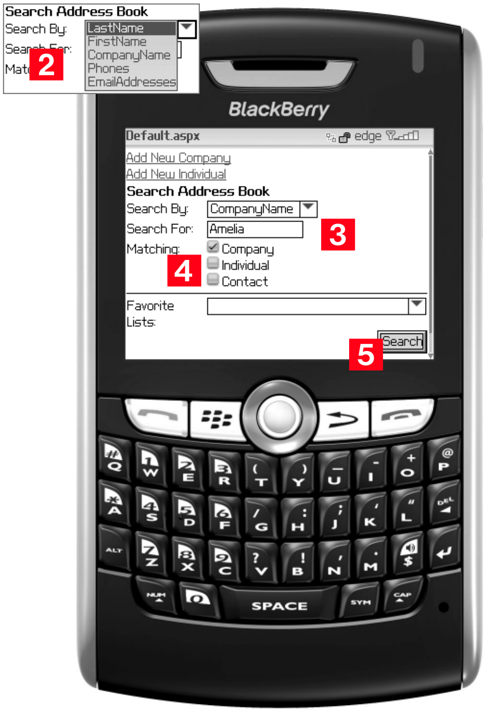
You can search for Address Book entries by last name, first name, company name, phone number, or email address in Wireless Access. You can also perform a Quick Search to search for Companies, Individuals, or Contacts directly from the main page. With the Quick Search you can search by Company name or by last name. You can also retrieve all Address Book entries in a Favorite List. See “Using Favorite Lists” on page 376 for more information.

➤ To search for Address Book entries

1. Open the Address Book page.
2. In the **Search By** drop-down list, select the field that you want to search for.
3. In **Search For** field, enter the text to search for.
4. In the **Matching** area, select the types of entries you want to retrieve—**Company**, **Individual**, or **Contact**.

5 Click **Search**.

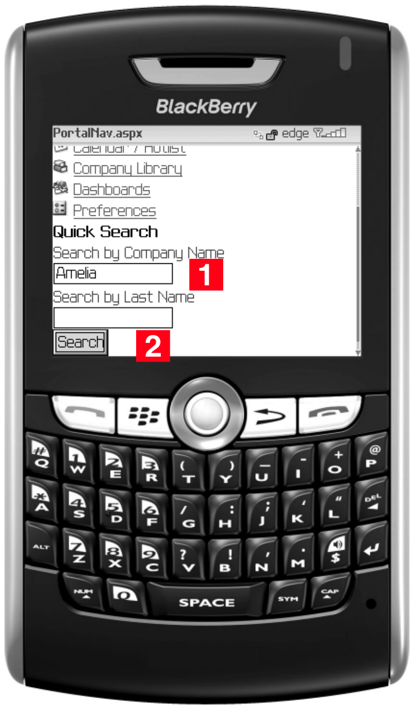
The page displays a list of matching Address Book entries.



➤ To perform a Quick Search

1. In the **Search Company by Name** or **Search Person by Last Name** field on the Wireless Access home page, enter the name of the Company or person.
2. Click **Search**.

   The page displays a list of matching Address Book entries.



View Address Book Entries

You can view the details of existing Address Book entries in Wireless Access. You can access Address Book entries from searches, from Favorite Lists, or from open opportunities, customer service cases, appointments, and tasks associated with the Address Book entries.

➤ To view an Address Book entry

The links in the View section work only if JavaScript is enabled on your device. You can disable the View section in your Navigation Preferences. If the View section is not visible, select View > Company from the Actions drop-down list.

- After performing a search or retrieving a Favorite List, click on the entry to open it.

  – or –

- In the **View** section at the top of an open opportunity, click **Company**.

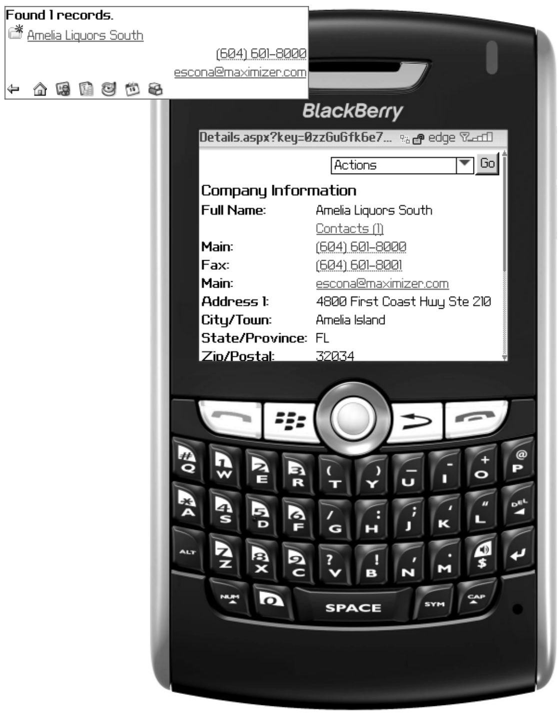
  – or –

- In an open case or appointment, click the link to the Address Book entry.

  – or –

- From the **Actions** drop-down list in an open task, click **View Company/Individual/Contact**.

  The page displays all the fields that have values for the Address Book entry.



Add New Address Book Entries

You can add new Companies and Individuals from the main Address Book page. You can add Contacts from existing Address Book entries.

➤ To add a Company or an Individual

1. From the Address Book page, click **Add New Company/ Individual**.

   The New Company or New Individual page opens.

2. Enter the basic information for the Company or Individual.

3. When you are finished, click **OK**.

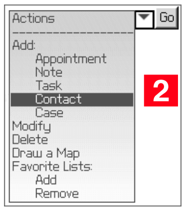
   The Company Information or Individual Information page opens displaying all the fields that have values for the Company or Individual.

➤ To add a Contact

1. Open an existing Company or Individual.
2. From the **Actions** drop-down list, select **Add > Contact** and click **Go**.

   The New Contact page opens.
3. Enter the basic information about the Contact.
4. When you are finished, click **OK**.

   The Contact Information page opens displaying all the fields that have values for the Contact.



Phone Address Book Entries

You can phone Address Book entries from the list of entries after performing searches or retrieving Favorite Lists or from open entries.

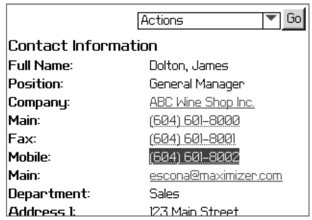
Entries' phone numbers are displayed only if the column setup includes a phone number field. Your administrator can specify the column setup used in Wireless Access.

➤ To phone an Address Book entry

- In a list of entries, click on the phone number next to the entry.

  – or –

  In an open entry, click on the phone number that you want to call. You can choose any phone number that's specified for the entry.



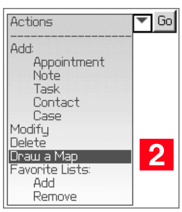
Draw Maps

You can quickly draw a map showing the location of an Address Book entry or of the Address Book entry associated with an opportunity or customer service case.

➤ To draw a map of an Address Book entry

1. Open an Address Book entry, opportunity, or customer service case.
2. From the **Actions** drop-down list, select **Draw a Map** and click **Go**.
3. Choose an online map site and click **Go**.

   The map to the Address Book entry's location appears.

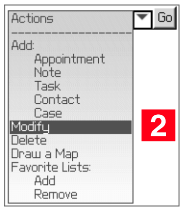


Modifying Entries

You can modify Address Book entries, customer service cases, appointments, tasks, and notes in Wireless Access.

➤ To modify an entry

1. Open the entry.
2. From the **Actions** drop-down list, select **Modify** and click **Go**.
3. Modify any of the fields.
4. When you are finished, click **OK** to save the changes.



Select Products/Services and Categories

For more information on displaying products/services and categories see Maximizer Help and Administrator Help.

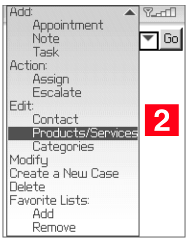
You can select products/services and categories for customer service cases and appointments.

➤ To select products/services and categories for an entry

1. Open the entry.
2. From the **Actions** drop-down list, select **Edit > Products/ Services** or **Edit > Categories** and click **Go**.

   The Select values for Products/Services or the Select values for Categories page opens.
3. Select values for the products/services or categories for the entry.
4. Click **OK**.

   The items you select are displayed in the entry.



Sending and Saving Email Messages

In Wireless Access you can send email to Address Book entries and save the email messages in Maximizer. In addition to the typical email functionality of your wireless device, you can save email messages as notes or documents with Address Book entries.

You can send email to Address Book entries in Wireless Access from open entries or from the list of entries after performing a search or retrieving a Favorite List.

➤ To send an email message to an Address Book entry

1. In a list of entries, click on the email address next to the entry. You can choose only the main email address for the entry.

   – or –

   In an open entry, click on an email address. You can choose any email address that's specified for the entry.

   The Send Email page opens. By default, the current Address Book entry's email address is included in the To field.

2. To add additional Address Book entries, click the **To**, **Cc**, or **Bcc** button, and search the Address Book.

   - In the **Search by** drop-down list, select **Last Name** or **Company**.
   - In the **Search for** field, enter the text to search for, then click **Search**.
   - In the **Entries available for assignment section**, select the Address Book entries that you want to add to the email.

   Click **OK** when you are finished.

3. Specify a subject and body text for the email message.

4. In the **Logging** section, specify your logging options.

   - Save body text of an email message that is sent to an Address Book entry as a note in the Notes window or as a document in the Documents window.
   - Specify default text to be included as part of a note.

ⓘ Your logging options for email must be enabled for notes in your user preferences in Maximizer (Preferences > Logging tab) for the logging options to work properly.

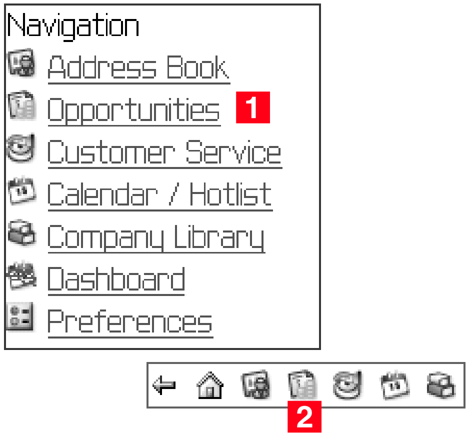
5 Click **Send**.


Found 3 records.
Dolton, James
(604) 601-8000
escona@maximizer.com
1
Johnson, Ed
(604) 601-8000
escona@maximizer.com
Torres, Martha
(604) 601-8000
escona@maximizer.com
Actions
Go
Contact Information
Full Name: Dolton, James
Position: General Manager
Company: ABC Wine Shop Inc.
Main: (604) 601-8000
Fax: (604) 601-8001
Mobile: (604) 601-8002
Main: escona@maximizer.com
Home: jdolton@home.com
1
BlackBerry
WriteEmail.aspx?key=NkWR8sIR... edge
Send Email
To >>
"Dolton, James" <jdolton@home.co
Cc >>
Bcc >>
Subject:
Body:
Importance:
2
Search for Recipient
Search By: Last Name
Search For: Dolton
Search
Ignore leads
2
Entries available for assignment
Dolton, James – General Manager (ABC Wine Shop Inc.); Main: escona@maximizer.com
OK
Cancel
SPACE
BlackBerry
WriteEmail.aspx?key=NkWR8sIR... edge
Subject: Revised price list
Body: revised price list this afternoon.
Thanks,
- Joe
3
Importance: Normal
Logging
Text for note:
Include body in note
4
Save copy to entry's Documents
Send
5
SPACE

Accessing Opportunities

You can access the Opportunities page in the following ways:

1. From the Wireless Access home page, click **Opportunities**.
2. From the navigation footer on the main pages, click the **Opportunities** icon.



Search for Opportunities

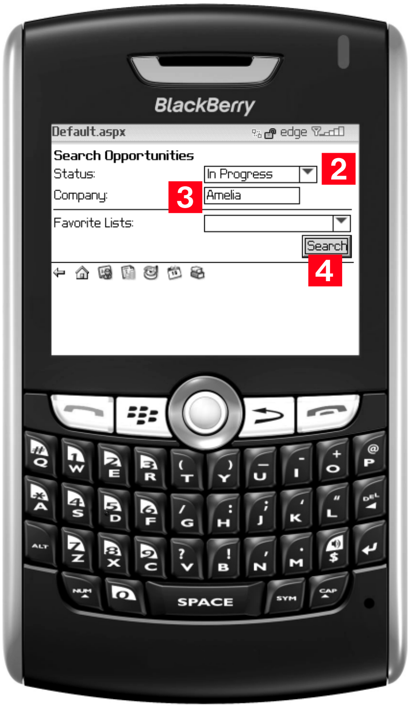
You can search for Opportunities by Company name and you can filter your searches by opportunity status in Wireless Access. You can also retrieve all opportunities in a Favorite List. See “Using Favorite Lists” on page 376 for more information.

➤ To search for an opportunity

1. Open the Opportunities page.
2. In the **Status** drop-down list, select the status of the opportunity or select **All Opportunities**.
3. In the **Company** field, specify the name of the company that the opportunity is associated with.

4 Click **Search**.

All opportunities matching the search criteria are displayed.



View Opportunities

You can view the details of existing opportunities in Wireless Access. You can access opportunities from searches, from Favorite Lists, or from Address Book entries associated with the opportunities.

➤ To view an opportunity

1 From the Opportunities page, perform a search or retrieve a Favorite List.

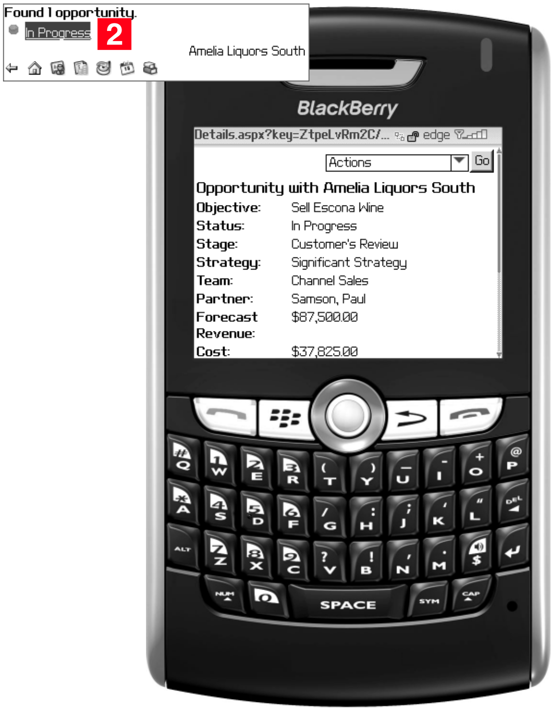
– or –

In the **View** section at the top of an open Address Book entry, click **Opps**.

The links in the View section work only if JavaScript is enabled on your device. You can disable the View section in your Navigation Preferences. If the View section is not visible, select View > Opps from the Actions drop-down list.

2 Click on the opportunity to open it.

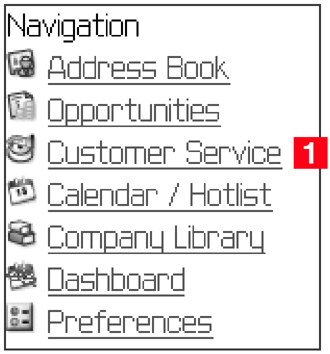
The page displays all the fields that have values for the opportunity.

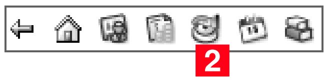


Accessing Customer Service Cases

You can access the Customer Service page in the following ways:

1. From the Wireless Access home page, click **Customer Service**.
2. From the navigation footer on the main pages, click the **Customer Service** icon.





Search for Cases

To view customer service cases, you can search by the case status and by the assigned user. You can also retrieve a Favorite List. For more information on Favorite Lists see “Using Favorite Lists” on page 376.

➤ To search for a case

1. Open the Customer Service page.
2. In the **Status** drop-down list, select the status of the case that you want to retrieve or select **All Cases**.
3. In the **Assigned to** drop-down list, select the Maximizer user that the case is assigned to, or select the empty field to retrieve cases assigned to all users.

4 Click **Search**.

The page displays all cases matching the search criteria.

View Cases

You can view the details of existing customer service cases in Wireless Access. You can access cases from searches, from Favorite Lists, or from Address Book entries associated with the cases.

➤ To view a case

1 From the Customer Service page, perform a search or retrieve a Favorite List.

– or –

In the **View** section at the top of an open Address Book entry, click **Cases**.

2 Click on the case to open it.

The page displays all of the fields that have values for the case.

The links in the View section work only if JavaScript is enabled on your device. You can disable the View section in your Navigation Preferences. If the View section is not visible, select View > Cases from the Actions drop-down list.

Add New Cases

You can add new customer service cases from Address Book entries or from existing customer service cases. When you create a new case from an existing case, the Address Book entry associated with the original case is also associated with the new case.

➤ To add a new case

1. Open the existing entry.
2. From the **Actions** menu in an Address Book entry, select **Add > Case**.

   – or –

   From the **Actions** menu in a case, select **Create a New Case**.

   The Select Values for Products/Services page opens.
3. Select the Products/Services for the case, and click **Next**.

   If Category is a mandatory field, the Select Values for Categories page opens. If Category is not a mandatory field, skip to Step 5.
4. Select the Categories for the case, and click **Next**.

   The remaining case information is displayed. Mandatory fields are marked with asterisks (*).
5. Enter the remaining fields for the case.
6. Click **OK** to save the case.

If you associate the case with a Company or Individual, you can associate a Contact with the case only after creating the case. For more information, see "Associate Contacts with Cases" on page 361.

Associate Contacts with Cases

You can change the Contact associated with an existing case or add a Contact to a case that is associated to only a Company or Individual.

➤ To associate a Contact with a case

1. Open the case.
2. From the **Actions** drop-down list, select **Edit > Contact** and click **Go**.

   The Modify Contact page opens showing the currently selected Address Book entry and Contact. You can search for other Contacts to associate with the case.
3. In the **Search by** drop-down list, select **Last Name** or **Company**.
4. In the **Search for** field, enter the text to search for, and click **Search**.

   The page refreshes and displays the Contacts matching the search criteria.
5. Select the Contact, and click **OK**.

   The Contact is added to the case.

Assign, Escalate, and Resolve Cases

You can assign, escalate, and resolve customer service cases in Wireless Access. When you assign cases, you can reassign the cases to any customer service team member. When you escalate cases, you can reassign the cases to only managers. When you resolve cases, you can specify billing information. You can automatically notify the assigned user, the case owner, and the Address Book entry when the case is reassigned or resolved. And you can create a Hotlist task to check on the case when the case is reassigned.

➤ To assign, escalate, or resolve a case

1. Open the case.
2. From the **Actions** drop-down list, select **Action > Resolve/ Assign/Escalate** and click **Go**.
3. In the **Assignment** area, select the Maximizer user that you are assigning the case to, select the status of the case, and enter a note to accompany the case.

   – or –

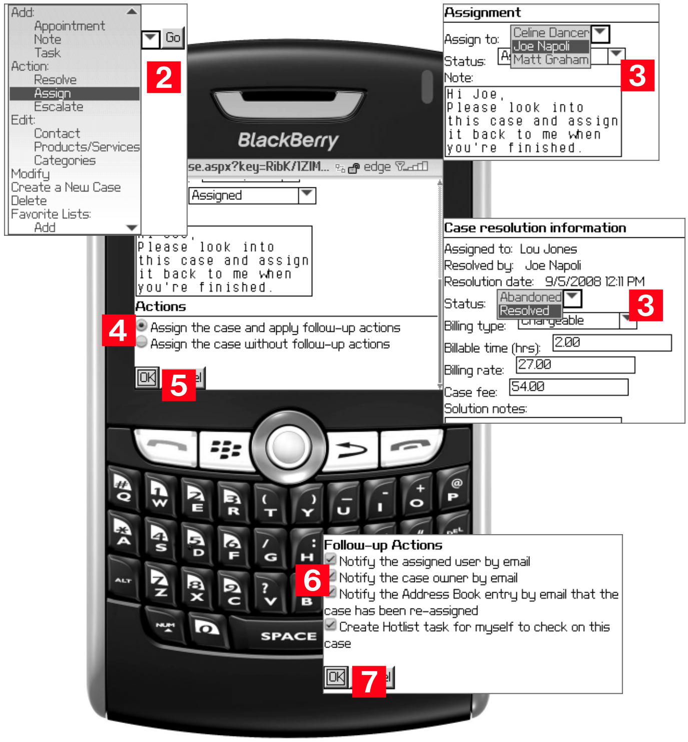
   In the **Case Resolution Information** area, select the status of the case, specify the billing information, and enter a note to accompany the case.
4. In the **Actions** area, specify whether or not you want to apply a follow-up action.
5. Click **OK**.

   If you select to assign/escalate/resolve the case without a follow-up action, the changes are saved to the case.

   If you select to apply a follow-up action, the Follow-up Actions page opens.
6. Select the follow-up actions that you want to apply to the case—**Notify the assigned user by email**, **Notify the case owner by email**, **Notify the Address Book entry by email**, or **Create Hotlist task for myself to check on this case**.

7 Click **OK**.

The changes are saved to the case and the selected actions are automatically applied.



Accessing User-Defined Fields

You can view and modify user-defined fields associated with Address Book entries, opportunities, and customer service cases.

The links in the View section work only if JavaScript is enabled on your device. You can disable the View section in your Navigation Preferences. If the View section is not visible, select View > UDFs from the Actions drop-down list.

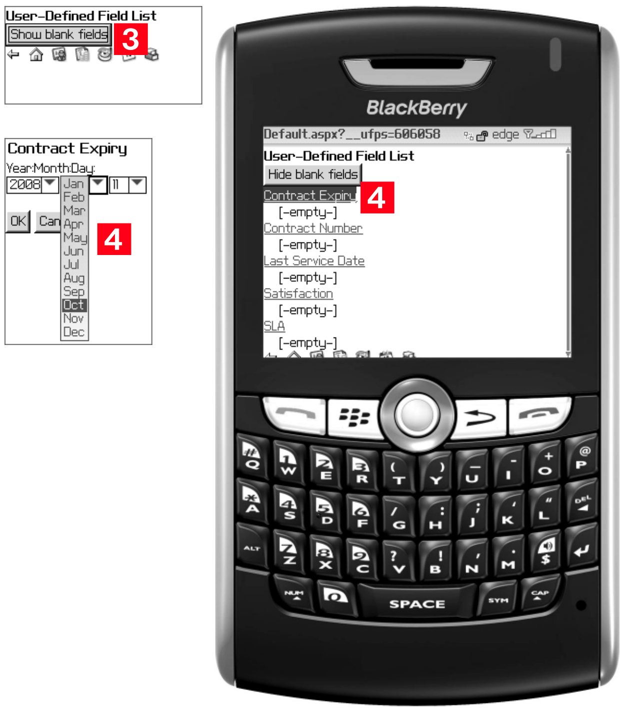
➤ To view and modify user-defined fields

1. Open the entry.
2. In the **View** section at the top of the entry, click **UDFs**.

   The User-Defined Field List page opens. The list may be empty if values are not yet selected for any of the entry's user-defined fields.
3. To view the blank user-defined fields click **Show blank fields**.

   The list displays all user-defined fields for the type of entry.
4. To modify a user-defined field, click on the user-defined field. Then, enter or select a new value, and click **OK**.

   The user-defined field is updated.



Accessing Notes

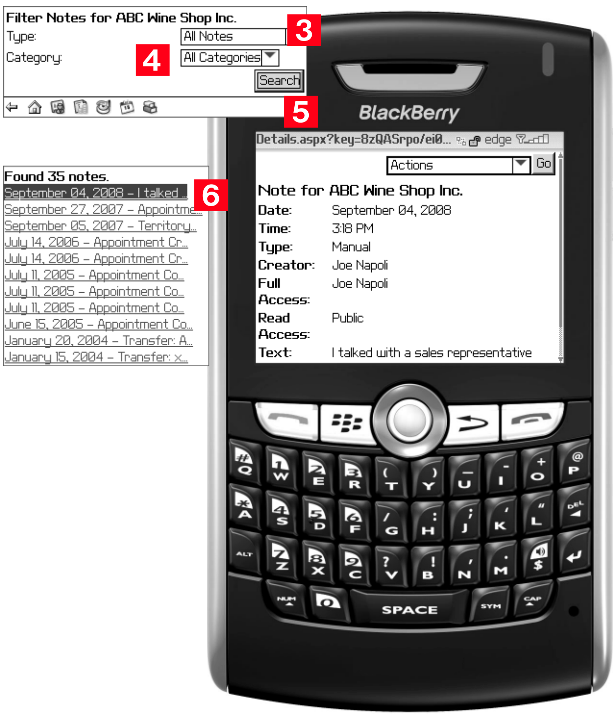
You can access notes associated with Address Book entries, opportunities, and customer service cases in Wireless Access.

The links in the View section work only if JavaScript is enabled on your device. You can disable the View section in your Navigation Preferences. If the View section is not visible, select View > Notes from the Actions drop-down list.

➤ To view a note

1. Open the entry.
2. In the **View** section at the top of the entry, click **Notes**.
3. In the **Type** drop-down list, select the type of note that you want to view, or select **All Notes**.
4. In the **Category** drop-down box, select the category that the note belongs to, or select **All Categories**.
5. Click **Search**.

   Notes matching the search criteria are returned. For long lists, you can click Next or Previous at the bottom of the page to view more notes.
6. Click on the note to view its details.



Add Notes

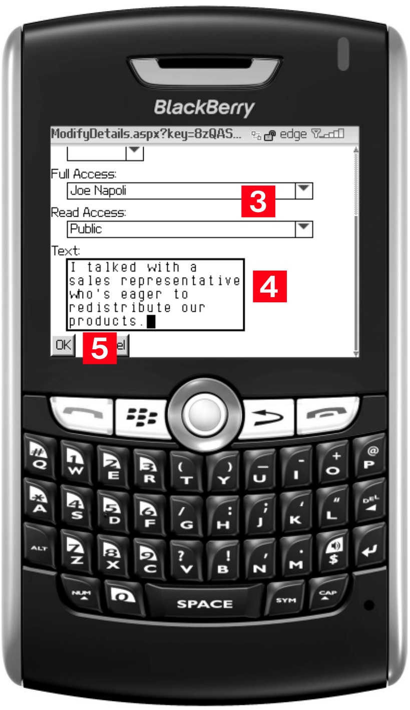
You can add new notes to existing Address Book entries, opportunities, and customer service cases.

➤ To add a note

1. Open the entry.
2. From the **Actions** drop-down list, select **Add > Note**.

   The New Note page opens.
3. In the **Full Access** and **Read Access** drop-down lists, select the user or group that has access rights to the note, or select **Public** to give full access or read access to all Maximizer users.

   You can also change the date and time of the note and assign a category to the note.
4. In the **Text** field, enter the text for the note.
5. Click **OK** to save the note.



Accessing Documents

The links in the View section work only if JavaScript is enabled on your device. You can disable the View section in your Navigation Preferences. If the View section is not visible, select View > Docs from the Actions drop-down list.

You can access documents attached to Address Book entries, opportunities, and customer service cases in Wireless Access.

➤ To access a document attached to an entry

1. Open the entry.
2. In the **View** section at the top of the entry, click **Docs**.
3. In the **Name** field, enter the name of the document. Or leave the field blank to retrieve all documents.
4. In the **Category** drop-down list, select the document's category. Or select **All Categories**.
5. Click **Search**.

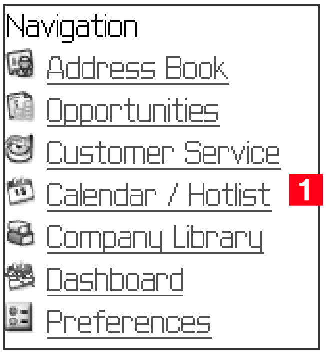
   Documents matching the search criteria are returned. For long document lists, you can click Next or Previous at the bottom of the page to view more documents.
6. Click on the document to view its details.

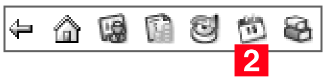
Once the document entry is open, you can use the Actions drop-down list to delete it and send it by email. For more information on sending email in Wireless access, see "Sending and Saving Email Messages" on page 352.

Accessing Calendar Appointments and Hotlist Tasks

You can access the Calendar / Hotlist page in the following ways:

1. From the Wireless Access home page, click **Calendar / Hotlist**.
2. From the navigation footer on the main pages, click the **Calendar / Hotlist** icon.



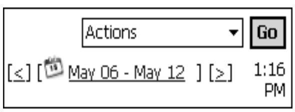


View Calendar

The default calender view follows the settings in Maximizer preferences ((File > Preferences > Calendar/ Hotlist.) If the default calendar view in Maximizer is monthly or weekly list, the default calendar view in Wireless Access is set to weekly.

You can view the Calendar/Hotlist in Daily or Weekly view mode. Use the back and forward arrows to move between days or weeks.

You can also go directly to a specific date or week by using the Date Picker. To open the Date Picker, click the date link below the Actions drop-down list.



➤ To change the calendar view

1. Open the Calendar/Hotlist.
2. From the **Actions** drop-down list, select **View Daily** or **View Weekly** and click **Go**.

View Appointments and Tasks

You can view the details of appointments and tasks in Wireless Access. You can access appointments and tasks from the Calendar or from Address Book entries, opportunities, or customer service cases associated with the appointments and tasks.

➤ To view an appointment or task

1. Open the Calendar/Hotlist.
2. Locate the appointment or task in the **Daily** or **Weekly** view.
3. Click the appointment or task that you want to view.

   The page displays details of the appointment or task.

To go back to the calendar view, click the Back icon.

➤ To view an appointment or task associated with an entry

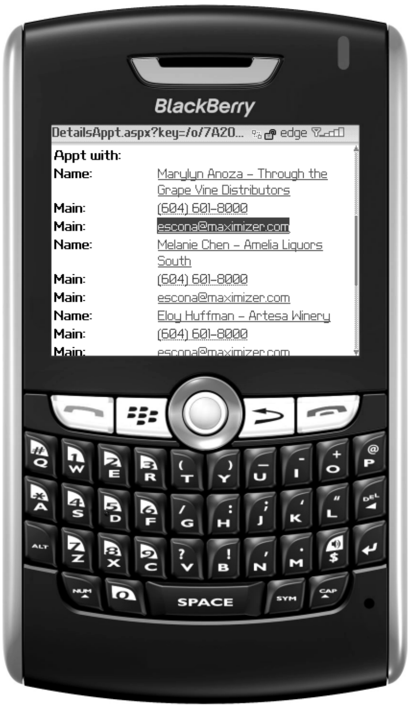
1. Open the entry.
2. In the **View** section at the top of the entry, click **Appts** or **Tasks**.

   All appointments or tasks associated with the entry are displayed.
3. Click the appointment or task that you want to view.

   The page displays details of the appointment or task.

   In appointments, the **Appt with:** section displays all Address Book entries assigned to the appointment. Entry information includes name, phone number, and email address.

ⓘ The links in the View section work only if JavaScript is enabled on your device. You can disable the View section in your Navigation Preferences. If the View section is not visible, select View > Appts/Tasks from the Actions drop-down list.



Add Appointments and Tasks

You can add personal appointments or tasks. And you can add appointments or tasks associated with Address Book entries or customer service cases.

When you add an appointment, the Date, From, and Until fields are filled in automatically, but you can change them if necessary. The Subject field is mandatory and cannot be left blank.

➤ To add a personal appointment or task

1. Open the Calendar.
2. From the **Actions** drop-down list, select **New Appointment/Task** and click **Go**.
3. Enter the appointment or task details and click **OK**.

➤ To add an appointment or task associated with an entry

1. Open the entry.
2. From the **Actions** drop-down list, select **Add > Appointment/Task** and click **Go**.
3. Enter the appointment or task details and click **OK**.

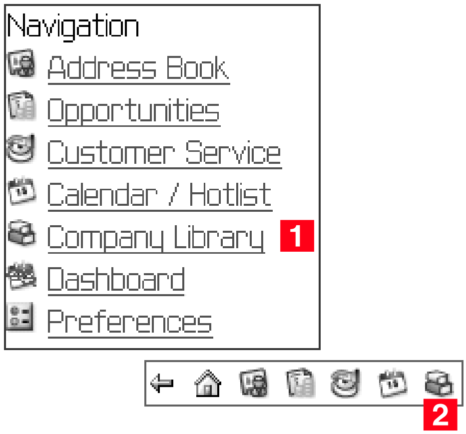
When you create an appointment for a Contact, a link is added to the Contact's email address in the appointment details. Click the link to compose an email message to the Contact. See "Sending and Saving Email Messages" on page 352 for more information.

If your device supports automatic dialing, you can click the Contact's phone number in the appointment details to make a call. See "Phone Address Book Entries" on page 349 for more information.

Accessing the Company Library

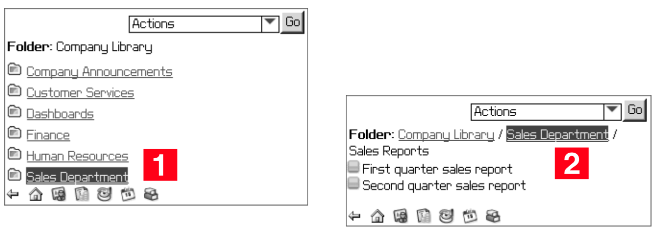
You can access the Company Library page in the following ways:

1. From the Wireless Access home page, click **Company Library**.
2. From the navigation footer on the main pages, click the **Company Library** icon.



➤ To browse in the Company Library

1. Click on a folder to open it and display its contents.
2. In the folder path, click on a parent folder to navigate to a folder further up in the hierarchy.



Search for Documents in the Company Library

You can search for Company Library documents by file name, author, creation date, and last modified date. You can search the entire Company Library or you can search a specific folder.

➤ To search for a document in the Company Library

1. Open the Company Library page.
2. To narrow your search to a specific folder, navigate to the folder.
3. From the **Actions** drop-down list, select the type of search you want to perform—**File Name**, **Author**, **Creation Date**, or **Last Modified Date**.
4. Click **Go**.

   The Document Search page opens.
5. Specify the search criteria.
6. In the **Scope of Search** area, choose either to search the entire Company Library or to search only the current folder. Click **OK**.

   The search results are displayed.

Send Company Library Documents to Address Book Entries

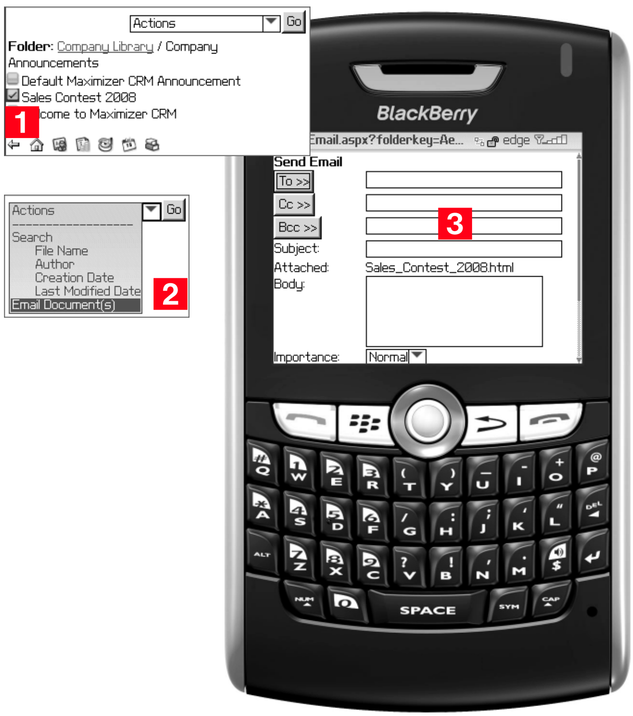
You can send Company Library documents to Address Book entries by email in Wireless Access.

➤ To send Company Library documents

1. In the Company Library page, select the documents that you want to send.
2. From the **Actions** drop-down list, select **Email document(s)** and click **Go**.

   The Send Email page opens with the documents attached to the email message.
3. Specify the recipient, the subject, the body, and the logging options for the email message.

   See "Sending and Saving Email Messages" on page 352 for more information.
4. Click **Send**.



Using Favorite Lists

To modify a Favorite List you must have the necessary access rights.

You can access Favorite Lists from the Address Book, Opportunities, and Customer Service pages. You can also modify Favorite Lists by adding or removing entries.

➤ To access a Favorite List

- In the Address Book, Opportunities, or Customer Service page, select a Favorite List from the **Favorite Lists** drop-down list and click **Search**. The entries for the Favorite List are displayed.

➤ To add an entry to a Favorite List

1. Open the entry that you want to add to the Favorite List.
2. From the **Actions** drop-down list, select **Favorite Lists > Add** and click **Go**.

   The Add current entry to Favorite List page opens.
3. Select the Favorite List you want to add the entry to, and click **OK**.

   The entry is added to the Favorite List.

➤ To remove an entry from a Favorite List

1. Open the entry that you want to remove from the Favorite List.
2. From the **Actions** drop-down list, select **Favorite Lists > Remove** and click **Go**.

   The Remove current entry from Favorite List page opens.
3. Select the **Favorite List** you want to remove the entry from, and click **OK**.

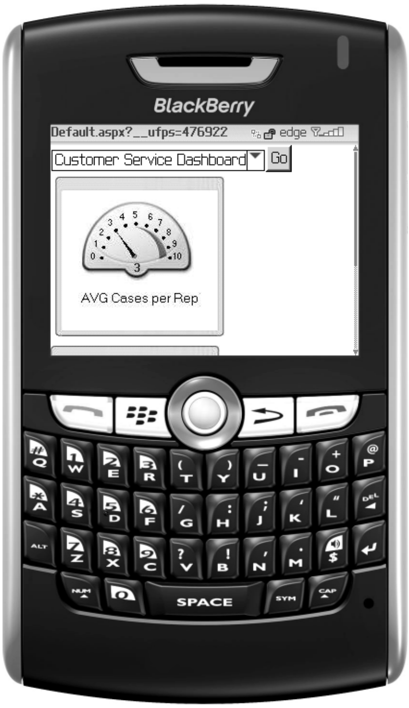
   The entry is removed from the Favorite List.

Viewing Dashboard

You can view Dashboard in Wireless Access. To view Dashboard, you must be a member of the Dashboard Users security group. You can view only dashboards that are published to the Wireless Access site. For information on publishing dashboards to Wireless Access, see the *Maximizer CRM Administrator's Guide*.

➤ To view Dashboard in Wireless Access

1. On the Wireless Access home page, click **Dashboard**.
2. Select a dashboard from the drop-down list and click **Go** to view a different dashboard.



Setting Wireless Access Preferences

You can change your navigation preferences and your MaxMobile synchronization settings from the Preferences page in Wireless Access.

The navigation preferences determine if the view actions are displayed as links or displayed in the Actions drop-down list.

➤ To change the navigation preferences

1. On the Wireless Access home page, click **Preferences**.
2. Under **Wireless Access preferences**, click **Navigation**.
3. Select or clear the **Display View actions as links** option.
   - To display the actions as links in open entries, select the option.
   - To display the actions in the Actions drop-down list, clear the option.
4. Click **OK**.

Change MaxMobile Synchronization Settings

Note that, as a user, you must be enabled for MaxMobile in user preferences to access these settings. You must also have the "Allow sync contacts with external clients" user privilege to be able to access Address Book, Opportunity, Customer Service, Note, and Document synchronization options.

You can edit MaxMobile synchronization settings from Maximizer Wireless Access.

To mark entries for synchronization with your Mobile device, you must first assign them to a Favorite List.

➤ To change MaxMobile synchronization settings

1. On the Wireless Access home page, click **Preferences**.
2. From the **MaxMobile synchronization settings** list, click on the **Address Book** link.
3. To synchronize Address Book, opportunity, and customer service case entries, select the **Synchronize Address Book entries** option, and select the Favorite List for synchronization of Address Book entries.

   Note that the **Synchronize Address Book entries** option controls the synchronization of Address Book, opportunity, and customer service case entries. The option also controls the synchronization of notes and documents. You must select this option first before you can set synchronization settings for all of these types of entries.

4. Click **OK** when you are finished setting the Address Book entry synchronization settings.

5. For the synchronization of opportunities, cases, notes, and documents, clicking on any of the module links opens the synchronization settings in read-only mode. Click on the **module link** and then click the **Edit** button to edit the settings. You must also select a **Favorite List** for opportunities and cases.

6. For each of the modules, specify the details for synchronizing **notes**, **documents**, and **user-defined fields**. For more information on notes, documents, and user-defined fields, see the corresponding sections of this guide.

7. For the synchronization of appointments and tasks, click on the **Appointments** and/or **Tasks** link and specify the details.

8. Specify your **Conflict resolution** settings. These settings determine whether Maximizer fields overwrite MaxMobile fields, or MaxMobile fields overwrite Maximizer fields, when changes have been made in both Maximizer and MaxMobile.

CHAPTER 10

Maintaining Your Address Book

Maintain Your Address Book

In this chapter...

"Setting Your Maximizer Preferences" on page 382

"Customizing Maximizer Toolbars and Toolbar Buttons" on page 385

"Backing Up Your Address Book Data" on page 389

"Exporting Address Book Records" on page 390

"Importing Address Book Data from MXI or XML Files" on page 399

"Importing Address Book Entries" on page 402

"Transferring Entries between Address Books" on page 407

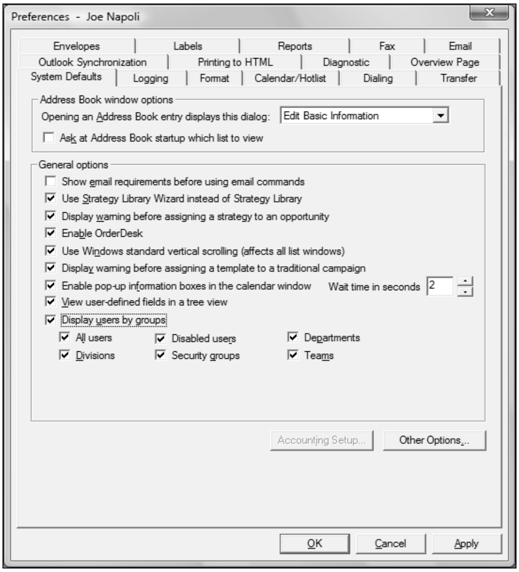
Setting Your Maximizer Preferences

The Preferences dialog box in Maximizer is where you can personalize how Maximizer works for you. This dialog box has various settings that provide a great deal of flexibility in how you work—in other words, Maximizer adapts to the way you want to work.

For detailed information, select the tab you are interested in and press F1 for a description of each item.

➤ To set your Maximizer preferences

1. Select **File** > **Preferences**.
2. Click the tab that corresponds to the area of Maximizer you want to configure. Each tab represents a different area of the program. The options you can set include the following:
   - **System defaults** such as Outlook calendar integration options
   - **Date**, **time**, and **mailing address formats**
   - **Calendar** and **Hotlist preferences**, including the sending of email to appointment attendees
   - **Email options**, such as to use text or HTML when composing messages
   - **Viewing preferences** for My Work Day (Overview Page)
   - **Dialing options** for phones and modems
   - **Transfer options**
   - **Printing options** for envelopes, labels, and reports
   - **Faxing options** (DDE settings for your fax software)



For detailed information, select the tab you are interested in and press F1 for a description of each item.

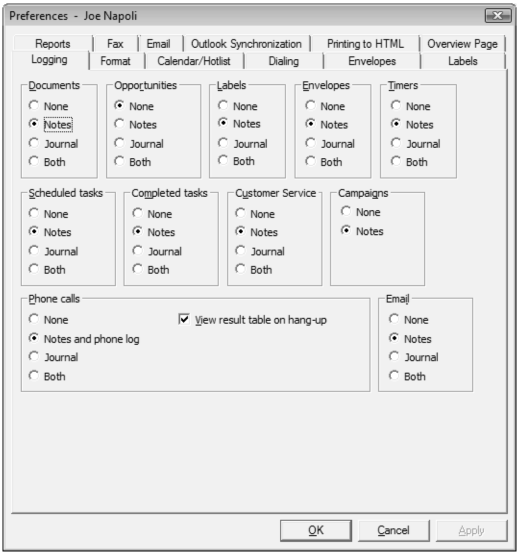
User preferences override the general Address Book preferences (File > Preferences).

➤ To set your user preferences

1. Select **File > Users > [your user ID] > Properties**, and click the Security tab. These access rights are set up in Administrator. Although you cannot change these settings, it's useful to know your access rights.
2. The options you can set include the following:
   - **Logging** for common actions and activities
   - **Outlook Synchronization** for synchronizing your Address Book data
   - Date, time, and **mailing address formats**
   - **Calendar** and **Hotlist** preferences, including the sending of email to appointment attendees
   - **Dialing** options for phones and modems
   - **Page layout** options for printing envelopes, labels, and reports
   - **Faxing** options and read-only preferences for page margins
   - **Email** options, such as to use text or HTML when composing messages
   - **HTML printing** options
   - Viewing preferences for **My Work Day**
3. To change your password, choose **Users** from the File menu, select your **user ID**, and click **Password**. Enter your password and enter it again to confirm the change.

   If you are running Maximizer on a SQL database, and have several Address Books on the SQL server, each of your passwords

must be identical. When you change one password, Maximizer will prompt you; select "Yes" to change the other passwords.



Customizing Maximizer Toolbars and Toolbar Buttons

To change the properties of an existing custom toolbar or toolbar button, select View > Toolbars, select the custom toolbar and click Customize. You can then select a specific button to modify its properties.

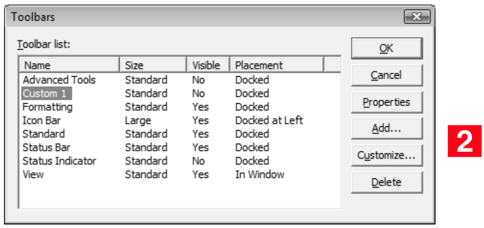
From a Maximizer custom toolbar you can perform specific actions such as launching another application or performing a specific search that was saved in your search catalog.

➤ To add a custom toolbar and button

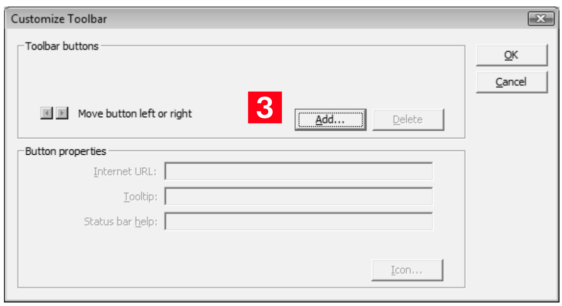
1. Select **Toolbars** from the **View** menu, or right-click in any frame containing a toolbar and select Customize from the shortcut menu. The Toolbars dialog box appears.

2. To create a new Custom toolbar, click **Add**.

   To add a button to an existing Custom toolbar, select that **toolbar** and then click **Customize**. The Customize Toolbar dialog box appears.



3. Click **Add**. The Add Toolbar Button dialog box appears.



4. Under **This new button will perform the following action**, select one of the following options, and then click Next.

   - **Browse a website**

     To add a button to browse a specific website or website document (usually beginning with http:// or www), select this option.

- **Open a document or application**

  To add a button to start an application such as a word processor, spreadsheet, graphics program, or to open a specific document or file, select this option.

- **Start a user-defined field for an Address Book entry**

  This option enables you to set up a relationship between an alphanumeric user-defined field and a toolbar button. When the toolbar button is clicked, the value of the specified UDF is treated as the fully qualified name of a document or an application that is to be started (opened).

- **Run a Maximizer macro/No macros present in current Address Book**

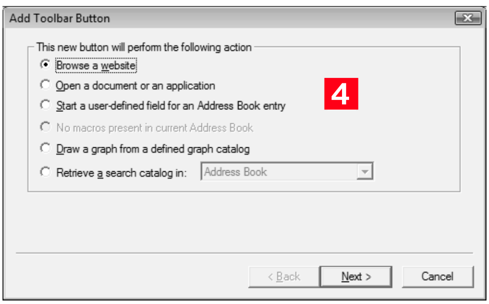
  To add a button to run a Maximizer macro, select this option. This option is grayed out if no macros are present in the current Address Book.

- **Draw a graph from a defined graph catalog/No saved graphs in current Address Book**

  To add a button to run a graph that has been saved in the graph catalog, select this option. The option is grayed out if no graphs have been saved in the catalog.

- **Retrieve a search catalog in [window]**

  To add a button to perform a search that has been saved in the search catalog, select this option. Also choose the window to which the search pertains from the drop-down list. For example, if you have created a search catalog entry for searching in the Customer Service window, select Customer Service.



5 Take one of the following actions:

- If you have chosen to Browse a website or Open a Document or an Application, type the path of the document/application or web address (URL). Or, click the **browse** button to locate the document/application or URL to run. If you would like an application to open a specific file, make sure that the

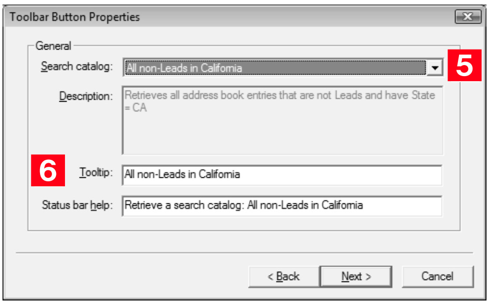
application path is enclosed in double quotes and put a space after the path of the application. For example, to launch WordPad and open the file Notes.txt, in the Document/ Application text box type the following:

"C:\ProgramFiles\Accessories\WordPad.exe" C:\Notes.txt

To load a new instance of an already running program, click the **Load new instance** checkbox.

- If you are launching a **user-defined field**, **macro**, **graph**, or **saved search**, select it from the drop-down list. The lists contain all user-defined fields, macros, graphs, and saved searches in the current Address Book.

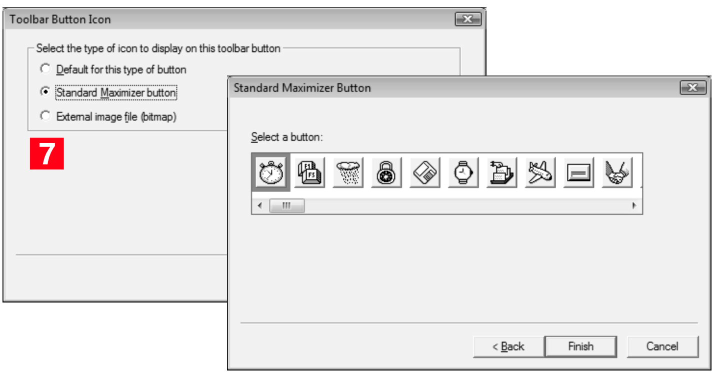
6 Edit the **Tooltip** and **Status Bar Help** text if you wish, and then click Next.



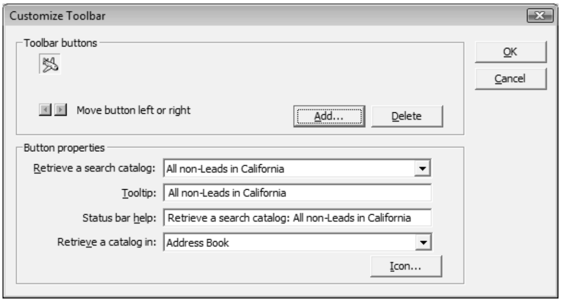
7 Select the type of icon you would like to display in the toolbar, and then click **Finish** or **Next** depending on the option you chose.

If you choose to display the default icon, Maximizer will select the icon automatically and you may go on to step 8.

If you choose to use a Standard Maximizer icon, select one of the available icons. If you choose to use an External Bitmap, locate the image using the browse button. Click **Finish**.



8 You can change the position of the new button on the toolbar using the **Move Button Left or Right** arrows.



9 Click **OK** and then click **OK** again to close the Toolbars dialog box.

You can customize Maximizer menus if you have any of the Maximizer Customization Suites installed. See the Customization Suite API Guide for further information.

Backing Up Your Address Book Data

The procedures vary depending on the Maximizer CRM Edition you are running. Follow the corresponding instructions.

Maximizer CRM Professional Edition and Maximizer CRM Enterprise Edition

For detailed instructions on backing up an Address Book, see the *Maximizer CRM Administrator's Guide* or your Microsoft SQL Server documentation. (Open the Microsoft SQL Server Enterprise Manager Help and look up "backing up" in the index.)

Maximizer CRM Group Edition

Back up your Address Book on a regular basis. If a problem occurs and you have to restore your data, you will have to re-enter all of the information since that backup. While one backup copy is often enough, you may want to keep two or three copies on a rotating basis. You can store your backup files on a network or on removable media such as a backup tape. You should always have one backup off-site.

In Maximizer you can perform only a Quick Backup. In Administrator, there are two types of backup procedures available:

- **Regular Backup**. This backup procedure requires the Address Book to be closed. See the *Maximizer CRM Administrator's Guide* and Administrator Help for assistance.

For more information on performing a Quick Backup, refer to "Quick Backup" on page 498.

- **Quick Backup**. This backup procedure is performed on an open Address Book. You can use this backup method from either Administrator or Maximizer. If security is enabled, you will need access to the MASTER user password.

Exporting Address Book Records

You can export Address Book entries, customer service cases, and Knowledge base articles from Maximizer, not Administrator.

Export Address Book Entries

Encrypted user-defined fields cannot be exported.

Exporting Address Book entries creates a text file or XML file containing information from the current Address Book. It exports any Companies and Individuals selected in the Address Book list. If no Address Book entries are selected, it exports all Companies and Individuals currently displayed in the list.

XML Format

The unique ID is exported with each Company or Individual, but unique IDs for contacts are not exported.

By default, exporting Address Book entries in XML format exports name, address, phone number, email address, and company details information from the Basic Information tab of the selected Companies and Individuals (or all entries in the list if none are selected). You can then easily import this file into another Maximizer Address Book.

You can optionally export the following additional information:

These options are available for XML export only, not CSV or tab-delimited exports.

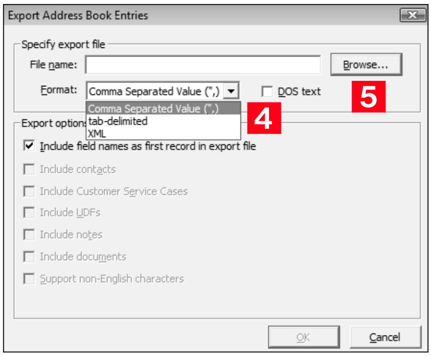
- **Include contacts** exports the contacts associated with the exported Address Book entries.
- **Include Customer Service Cases** exports customer service cases associated with the exported Address Book entries.
- **Include Opportunities** works the same way as Include Customer Service Cases from above. It exports Opportunities associated with the exported Address Book entries.
- **Include UDFs** exports all Address Book user-defined fields associated with the exported Address Book entries, along with their attributes, and in the case of table user-defined fields, any items they contain. Keep in mind that exporting user-defined fields increases the length of time required for the export process, and not selecting this option improves speed.
- **Include notes** exports notes associated with the exported Address Book entries, including date and time, owner, creator, type, and text fields.
- **Include documents** exports documents associated with the exported Address Book entries, including date and time, document type, document name, creator, owner, as well as the document data itself.
- **Support non-English characters** converts the contents of the exported XML file to Unicode format, which is required for

languages using more than one byte per character, such as Chinese. If you don't select this checkbox, characters will be exported in ASCII format.

➤ To export Address Book entries in XML format

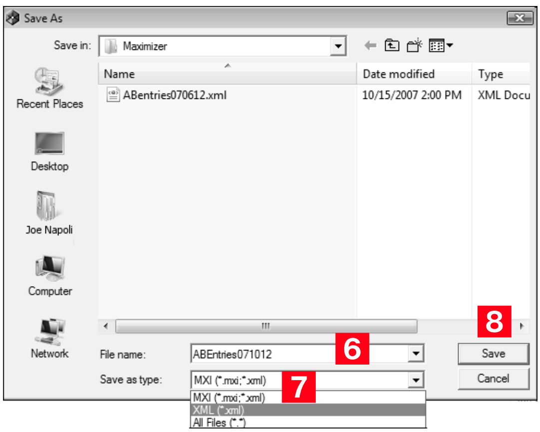
1. In Maximizer, open the **Address Book** window.
2. Select the Companies and Individuals to export. If you don't select any entries, Maximizer will export all entries currently displayed in the Address Book list.
3. Select **File** > **Export** > **Address Book entries**.

   The Export Address Book Entries dialog box opens.



4. From the **Format** drop-down list, select **XML**.
5. Click **Browse**.

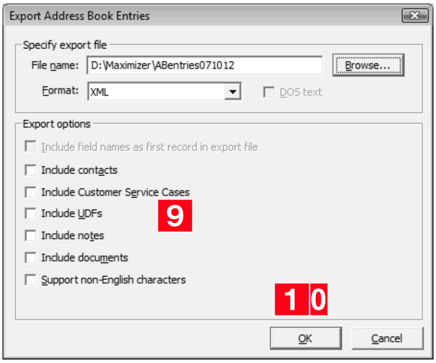
   The Select Export File dialog box opens.



6 Specify the destination location and **file name** for the exported file.

7 In the **Save as type** drop-down list, select either **MXI** or **XML**.

8 Click **Save**.



9 Select any of the **Export options**, as needed. Each of the options is described before this procedure.

10 Click **OK**.

Maximizer exports the Address Book entries and additional data as selected in the options to the specified file.

Comma-Separated Values or Tab-Delimited Format

User-defined fields that contain more than one item are not supported in a CSV or tab-delimited export. Use XML export instead.

Exporting to comma-separated values (CSV) format creates a file with a .CSV extension, which is readable by spreadsheets such as Microsoft Excel and many other programs.

Exporting to tab-delimited format creates a text (.txt) file with tabs separating each field value. This file is readable by any program that supports .txt files.

Exporting to these formats exports selected Companies and Individuals in the Address Book, but you do not have the option of exporting Contacts.

Unlike XML format, exporting to CSV and tab-delimited format enables you to specify individual fields to export, including Address Book user-defined fields.

You can also export Notes associated with the Companies or Individuals. You have the option of exporting all notes or most recent notes.

Selecting Fields for Export

When exporting to CSV or tab-delimited format, you must select which fields to export, and in which order. The Select Fields for Export dialog box has two columns: the left column lists the Address Book entry basic fields, user-defined fields, and two fields for notes; the right column is initially blank. Select the fields to export from the left column and add them to the right column.

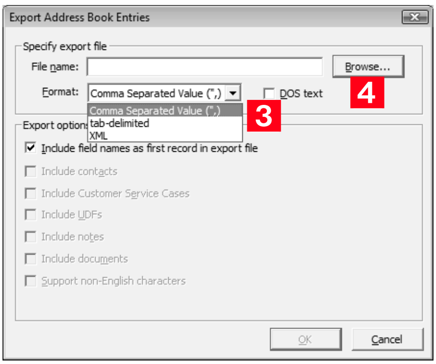
The order of fields in the right column is the order in which they will be exported. If you need to change the order of any fields, select each one and click Remove to delete it from the list; then, in the right column, select the field after which you want to place another field. Fields added to the right column appear directly below the field currently selected in the right column.

Once you have established the order of export fields as you would like it, you can click the **Catalog** button to save the export list for future exports. In the Export Catalog dialog box, click **Add** to create a new saved export list, or click **Save** to overwrite an existing export list. The **Retrieve** button opens an existing export list.

➤ To export Address Book entries in CSV or Tab-delimited format

1. In Maximizer, open the Address Book window.
2. Select **File** > **Export** > **Address Book entries**.

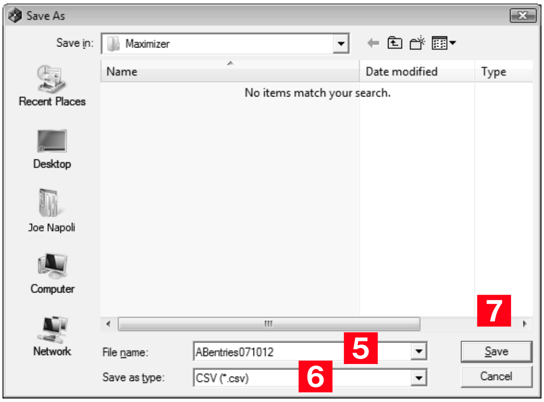
   The Export Address Book Entries dialog box opens.



3. From the **Format** drop-down list, select **Comma Separated Value** or **tab-delimited**.

4 Click **Browse**.

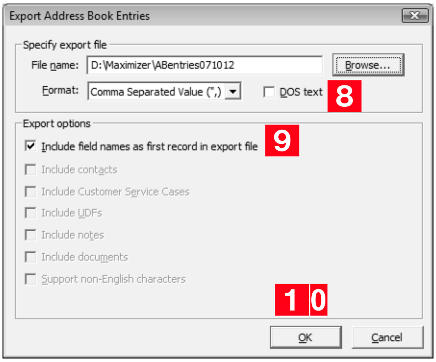
The Select Export File dialog box opens.



5 Specify the destination location and **File name** for the exported file.

6 Verify that the format you selected previously appears in the **Save as type** field.

7 Click **Save**.



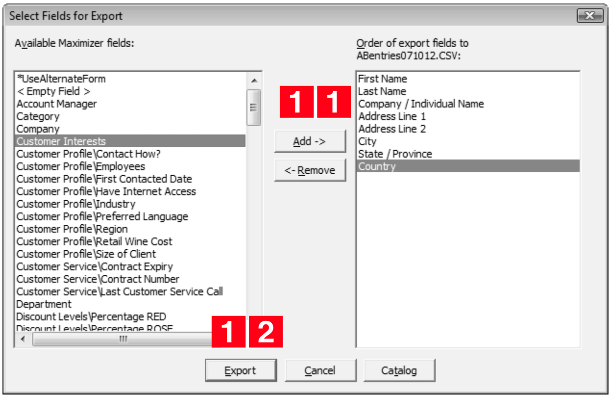
8 Select the **DOS text** checkbox to export data that is in DOS standard ASCII.

If the data is in ANSI ASCII (Windows default), do not select the checkbox.

9 If you want the field names to be exported as the first record in the exported file, similar to a headings row, select the **Include field names as first record in export file** checkbox.

10 Click **OK**.

The Select Fields for Import dialog box opens.



For more information about using the Select Fields for Export dialog box, refer to "Selecting Fields for Export" on page 393.

11 From the **Available Maximizer fields** list, select the fields to export by selecting each field and clicking **Add**.

– or –

Click **Catalog** to retrieve a previously saved export list.

12 Click **Export** to begin the export process.

Export Customer Service Cases

You can also export Customer Service Cases from the Export Address Book Entries dialog box, but doing so only exports cases associated with the exported Address Book entries. For more control over which cases are exported, use Export Customer Service Cases.

You can export customer service cases, their associated Address Book entries, as well as any related user-defined fields, notes, or documents. Exporting customer service cases exports any cases that have been selected in the Customer Service window (or all cases in the list if none are selected). The export file can be either Maximizer XML Interface (MXI) or XML format.

MXI and XML files are both in XML format. However, you can import into Maximizer with MXI files more easily than XML format. To import an MXI file, simply double-click the file and it automatically handles the import.

The Export Customer Service Cases dialog box includes the following options:

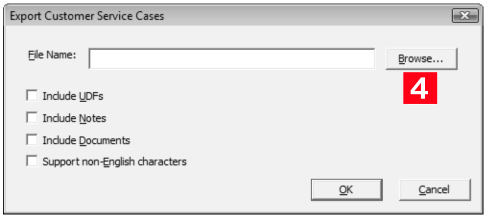
- **Include UDFs** exports all Customer Service user-defined fields associated with the exported cases, along with their attributes, and in the case of table user-defined fields, any items they contain. Keep in mind that exporting user-defined fields increases the length of time to export, and not selecting this option improves speed.
- **Include notes** exports notes associated with the exported cases, including date and time, owner, creator, type, and text fields.
- **Include documents** exports documents associated with the exported cases, including date and time, document type, document name, creator, owner, as well as the document data itself.
- **Support non-English characters** converts the contents of the exported MXI or XML file to Unicode format, which is required for languages using more than one byte per character, such as Chinese. If you don't select this checkbox, characters will be exported in ASCII format.

➤ To export customer service cases

1. In Maximizer, open the **Customer Service** window.
2. Select the cases to export. If you don't select any cases, Maximizer will export all cases currently displayed in the Customer Service window.

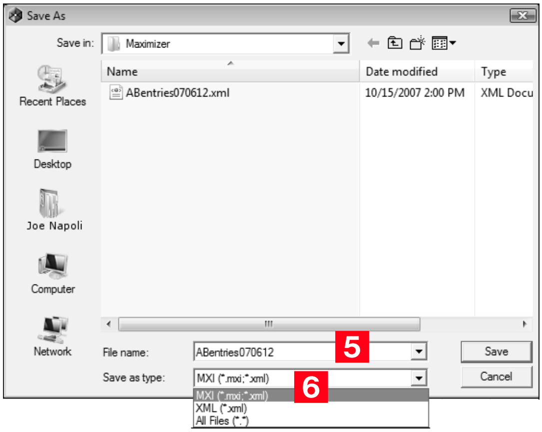
3 Select **File** > **Export** > **Customer Service Cases**.

The Export Customer Service Cases dialog box opens.



4 Click **Browse**.

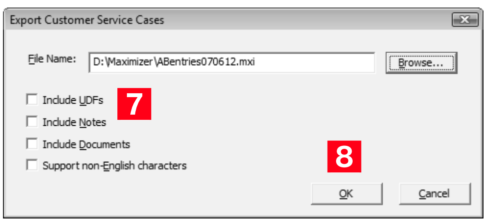
The Save As dialog box opens.



5 Specify the destination location and **File Name** for the exported file.

6 From the **Save as type** drop-down list, select either **MXI** or **XML**, and click **Save**.

The Save As dialog box closes.



7 Select any of the **Export options**, as needed. Each of the options is described before this procedure.

8 Click **OK**.

Maximizer exports the customer service cases, associated Address Book entries, and additional data as selected in the options, to the specified file.

Export Knowledge Base Articles

For an explanation of MXI format, refer to the previous page.

As with customer service cases, you can export knowledge base articles to either MXI or XML format. The resulting file contains the content of the article itself, as well as additional information, such as file name, file extension, keywords, product, status, and creator.

➤ To export knowledge base articles

1. In Maximizer, open the **Knowledge Base** window.
2. Select **File** > **Export** > **Knowledge Base Articles**.
3. Specify the destination location and **File Name** for the exported file.
4. From the **Save as type** drop-down list, select either **MXI** or **XML**.
5. Click **Save**.

   Maximizer exports the knowledge base articles to the destination file.

Importing Address Book Data from MXI or XML Files

You can use Administrator or Maximizer to import Address Book entries, customer service cases, knowledge base articles, and other data from MXI (Maximizer XML Interface) or XML Files. These MXI and XML files may have been created by exporting from Maximizer or by exporting the information from another source and converting it to XML using the Maximizer XML schema. For more information about the Maximizer XML Schema, refer to the *Maximizer CRM Administrator's Guide*.

After importing Address Book entries into Maximizer, you can identify the imported records by selecting **View** > **Favorite Lists** in the Address Book window. A list of imported Address Book entries is stored in a Favorite List named according to the file format and import date and time.

About the MaxExchange Distribution field and XML Import

When importing the MaxExchange Distribution field from an XML file, if the destination Address Book hasn't created the field already, a version of this field will be created in the Address Book during the XML import, but it will NOT be the system MaxExchange Distribution field, and therefore will not work with the MaxExchange product.

If your XML file contains the MaxExchange Distribution field, please ensure that the destination Address Book has created the field already. (For information about creating the MaxExchange Distribution field, refer to the *Maximizer CRM Administrator's Guide*.) This measure will ensure proper MaxExchange distribution in the destination Address Book.

Also if the name of the MaxExchange Distribution field has been changed in the XML file, you must rename the field in the destination Address Book to match the name in the XML file before importing it.

Import MXI or XML Files

For more control over importing MXI files, or to import XML files, use the Advanced Import method described below, which enables you to specify a number of preferences about how to import the file.

Note that customer service cases are always imported as separate records and are never merged with existing cases.

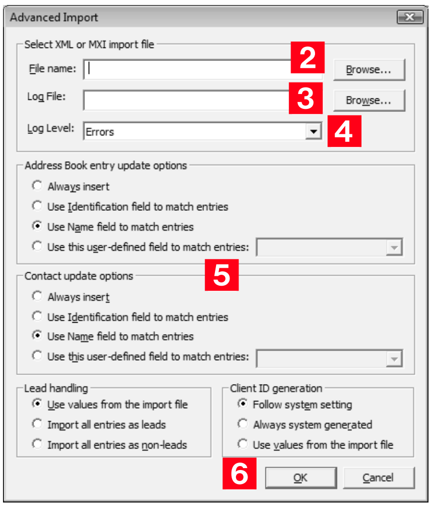
➤ To import from an MXI or XML file

Always back up the Address Book before importing.

1. Select **File** > **Import** > **Advanced Import**.
2. For the **File name** field, click **Browse** and locate the .xml or .mxi file to import.

   Once you have selected the file to import, Maximizer fills in the Log File field automatically to create a log file with the same name and location as the import file.
3. To change the default **Log File**, click **Browse** and provide an alternate log file location and/or name.
4. Select a **Log Level** from the drop-down list.
5. Specify any additional import options in the other group boxes.
6. Click **OK** to begin the import.

For detailed information about any of the fields in this dialog box, press F1 while the dialog box is active.



   Maximizer imports the data and then displays the number of records inserted, updated, and failed for each record type.

7. Click **OK** to close the message box.

Import Knowledge Base Articles

To import knowledge base articles that have been exported from Maximizer in MXI or XML format, use the Import Knowledge Base Articles functionality in Maximizer.

Note that knowledge base articles are always imported as separate records and are never merged with existing articles.

➤ To import knowledge base articles

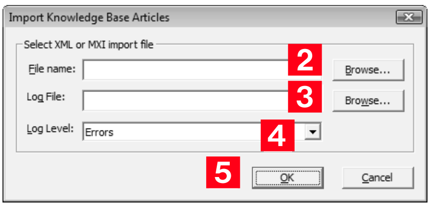
Always back up the Address Book before importing.

1. Select **File** > **Import** > **Knowledge Base Articles**.
2. For the **File name** field, click **Browse** and locate the .xml or .mxi file to import.

   Once you have selected the file to import, Maximizer fills in the Log File field automatically to create a log file with the same name and location as the import file.
3. To change the default **Log File**, click **Browse** and provide an alternate log file location and/or name.
4. Select a **Log Level** from the drop-down list.

For detailed information about any of the fields in this dialog box, press F1 while the dialog box is active.

5. Click **OK** to begin the import.



   Maximizer imports the data and then displays the number of records inserted, updated, and failed for each record type.
6. Click **OK** to close the message box.

Importing Address Book Entries

Use Administrator or Maximizer to import Address Book information from other sources. Some import methods are available only through Administrator.

After importing Address Book entries into Maximizer, you can identify the imported records by selecting **View** > **Favorite Lists** in the Address Book window. A list of imported Address Book entries is stored in a Favorite List named according to the file format and import date and time.

Administrator provides the following methods of importing data. The best import method depends on the type of data you are importing.

- **MXI or XML Files:** Refer to "Import MXI or XML Files" on page 400 for more information.
- **Address Book Entries:** This method imports entries from a text file that is created when you export from another application. Outlook, for example, can export its address book to a text file. When you import from a text file, you must choose to import all the entries as Companies/Individuals or as Contacts, or you can do a two-tier import to import Companies/Individuals first and then import the associated Contacts.
- **ACT! or GoldMine Database:** Importing an ACT! or GoldMine database is straightforward as Maximizer can detect the ACT! or GoldMine database version and map the fields automatically. In Maximizer CRM Professional Edition and Maximizer CRM Enterprise Edition, this import method is available through Administrator only. In Maximizer CRM Group Edition, this import method is available through Administrator or Maximizer if you are logged in as the MASTER user. For information about importing from ACT! or GoldMine, refer to the *Maximizer CRM Administrator's Guide* or Administrator Help (Help > Contents).
- **Other Contact Manager Database:** This option enables you to import a variety of data file formats, including Organizer, Clipper, dBASE, FoxBase, and FoxPro, among others. or GoldMine database version and map the fields automatically. In Maximizer CRM Professional Edition and Maximizer CRM Enterprise Edition, this import method is available through Administrator only. In Maximizer CRM Group Edition, this import method is available through Administrator or Maximizer if you are logged in as the MASTER user. For information about importing from other contact manager databases, refer to the *Maximizer CRM Administrator's Guide* or Administrator Help (Help > Contents).

Use the following tables to determine which import method to use.

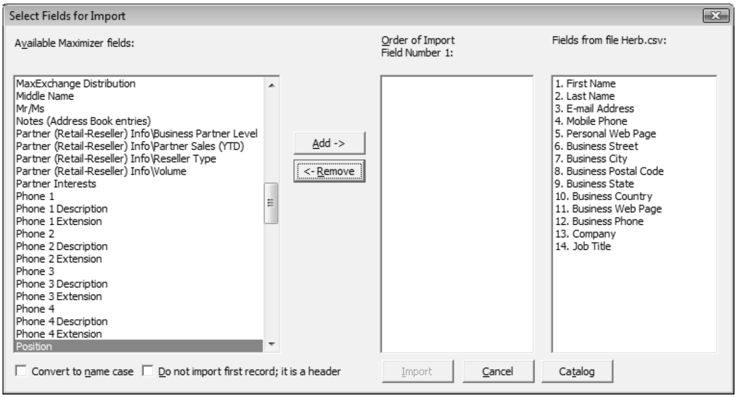
File Type	Import Method(s) (File > Import > ...)
ACT! 1.x, 2.x, 3.x, 4.x, 2000, 6.x (*.dbf)	ACT! Database
GoldMine 2.x, 3.x, 4.x, 5.x, 6.x (*.dbf), 6.x (MSSQL), 8.x (Firebird SQL, MSSQL)	GoldMine Database
Organizer 1.x (*.org)	Other Contact Manager Database
Delimited (*.txt, *.prn)	Other Contact Manager Database
Comma Delimited (*.csv) Tab Delimited (*.txt)	Address Book Entries
Clipper Summer '87 (*.dbf)	Other Contact Manager Database
Clipper 5.x (*.dbf)	Other Contact Manager Database
dBase III, III+, IV (*.dbf)	Address Book Entries
dBase V (*.dbf)	Other Contact Manager Database
Visual dBase 5.x (*.dbf)	Other Contact Manager Database
FoxBase/FoxBASE+ (*.dbf)	Other Contact Manager Database
FoxPro 1.x, 2.x (*.dbf)	Other Contact Manager Database
Visual FoxPro 3.x (*.dbf)	Other Contact Manager Database

Field Mapping

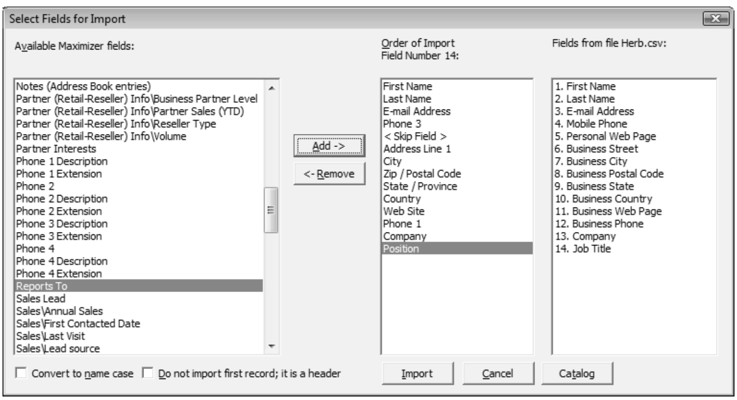
When you import from a recognized database type, such as GoldMine or ACT!, Maximizer automatically maps the fields for you.

When importing some types of data files, you need to map—create an association between—the fields in the source file and the fields in Maximizer. Keep in mind that different applications name their fields differently. For example, the field for a company name is called "Company" in Outlook and "Company or Individual" in Maximizer.

When you are importing a file type that requires you to map fields, a dialog box similar to the following opens.



For each field in the source file (shown in the far right column), select one of the available Maximizer fields and, click **Add** to map the fields. Select a corresponding Maximizer field for every field in the source file. If there is no corresponding field, select **<Skip Field>** from the list of Maximizer fields. When you have finished mapping the fields, the Order of Import (middle column) displays the corresponding Maximizer field beside each field in the Fields from File column, as illustrated below.



Two-Tier Import

If you import a Company record, and an existing Company record in the database has an identical "Company" field, then the records are considered duplicates, and Maximizer will not import the duplicate Company record. However, Maximizer will import duplicate Individual and Contact records.

Many contact management programs keep two types of address book entries:

- Companies
- Contacts for Companies

Maximizer keeps its Address Book entries organized in a similar way:

- Companies/Individuals
- Contacts (associated with a Company or Individual)

The Import Address Book Entries function enables you to perform a two-tier import. In a two-tier import, you first import Company entries as Companies/Individuals Address Book entries, and then you import the people as Contacts.

Two-tier importing is only applicable to comma-separated value files, tab-delimited files, dBase III, III+, or IV, or XML files using the File > Import > Address Book Entries command.

➤ To import Address Book entries (two-tier import)

Always back up the Address Book before importing.

User-defined fields containing more than one available item are not supported in a CSV (comma-separated values) import. Use the Advanced Import feature or MTI (Maximizer Transfer Interface) as an alternative.

1. From the **File** menu, select **Import** > **Address Book Entries**.

   The Import Address Book Entries dialog box opens.

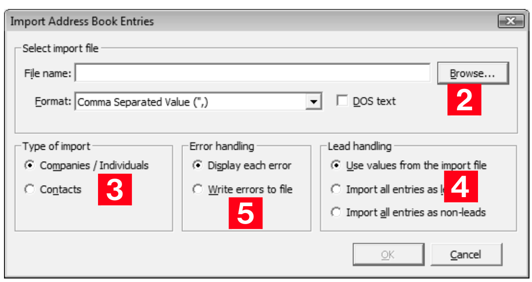
2. Click **Browse** and locate the file to import.

3. Select the **Companies / Individuals** option to import all records in the source file as Company or Individual Address Book entries.

   (After you complete this procedure, repeat it a second time to import the Contacts. If you choose not to do a two-tier import, just select either **Companies / Individuals** or **Contacts**.)

4. In the **Lead handling** box, select the appropriate option for importing records as lead or non-lead Address Book entries.

5. Click **OK**.



The Select Fields for Import dialog box opens.

6 In the **Available Maximizer fields** column, select the field that best corresponds to the first field in the **Fields from file <file name>** column, and click **Add**.

Repeat this step until you have mapped all the fields from the source file to Maximizer fields.

To exclude a field from being imported into Maximizer, add <Skip Field> to the middle column for that field position.

For example, if the first field in the right column is First Name, select First Name from the Available Maximizer fields.

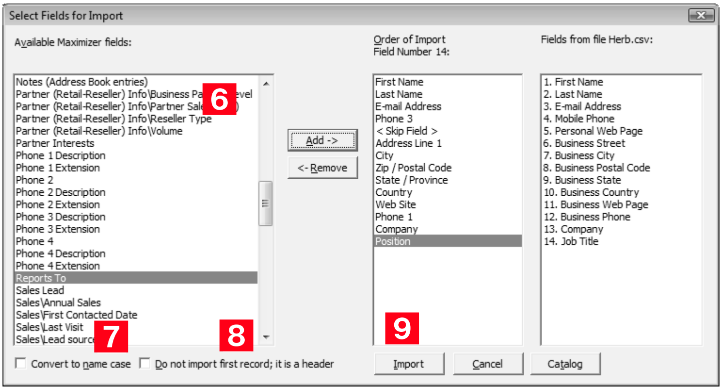
The fields listed in the Available Maximizer Fields column is slightly different, depending on whether you selected Companies / Individuals or Contacts as the Type of Import in step 3.

7 To convert text that is in capital letters (uppercase) into mixed case, select the **Convert to name case** option.

8 Many comma-delimited data files use the first line as a column header. To exclude the first line from being imported, select the **Do not import first record; it is a header** option.

You can save the field mapping for reuse by clicking the Catalog button.

9 Click **Import**.



The data from the source file now imports into Maximizer.

10 Repeat this procedure a second time to import the second tier, except select **Contacts** instead of **Companies / Individuals** as the Type of Import in step 3.

Transferring Entries between Address Books

Encrypted user-defined fields cannot be transferred to another Address Book.

Importing refers to copying data from an external database into a Maximizer Address Book. However, transferring refers to copying data between Maximizer Address Books. Transferring data is ideal for merging Address Books together and sharing entries and setups.

Transfer rights can be set on a per-user basis, although some field transfer options apply to all users.

What Happens During Transfers?

You should never use Maximizer Email Transfer (MET) between two MaxExchange-synchronized computers. Using MET and MaxExchange in combination adds records twice on the destination computer—once through MET, and again through MaxExchange.

Note that each Address Book entry has a unique ID.

Once you start a transfer, Maximizer uses the following rules to determine which records to copy from the source Address Book into the target Address Book:

- **Address Book entry IDs** — If an Address Book entry ID number from the source Address Book does not exist in the target Address Book, the Address Book entry is inserted into the target Address Book.
- **Address Book entry names** — If the Address Book entry ID number from the source exists in the target Address Book, Maximizer compares the source and target Address Book entry names.

  If the names are different, Maximizer changes the ID number in the target Address Book and inserts the entry as a new Address Book entry.

  If the Address Book entry names are the same, they are considered to be duplicate entries. In this case, Maximizer merges duplicate Address Book entries in the target Address Book.
- **Date and Time** — Maximizer also checks the date and time of the record. It will not overwrite data in the target Address Book that has been modified more recently than the data in the source Address Book.

Transfer Address Book Entries

? For more information about transferring other information such as column setups, see Maximizer Help.

By default, when you transfer Companies or Individuals, the following are included—all associated Contacts, user-defined fields, notes, files, appointments, Hotlist tasks, orders (not available for SQL), and opportunities. Encrypted user-defined fields and customer service cases cannot be transferred.

To see if you have transfer and export rights, go to File > Users (select your user ID) > Properties > Security.

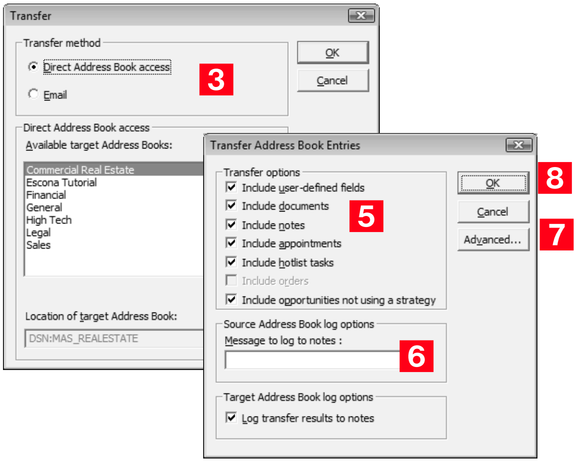
➤ To transfer Address Book entries

1. In the Address Book window, select the **entries** you want to transfer.
2. Select **File > Transfer > Address Book** entries.
3. Select **Direct Address Book Access** or **Email** as the transfer method.

   If you have chosen to transfer your Address Book entries using **Direct Address Book access**, select the **target Address Book** before clicking **OK**. A login dialog box appears.
4. Type your **user ID** and **password** to log in to the target Address Book, and click **OK**. The Transfer Address Book Entries dialog box appears.
5. Select the **transfer options**. For example, you can choose to include or not include user-defined fields, documents, notes, appointments, Hotlist tasks, orders, and simple opportunities (not using a strategy).
6. Enter a **note** to be logged for each Address Book entry affected by the transfer if necessary.
7. To set the advanced options, click the **Advanced** button. See the F1 Help for more information on each available option.
8. Click **OK** to begin.
9. When Maximizer finishes, the Transfer Summary displays the results of the transfer.

   If you chose to send the data by email, Maximizer prepares the transfer file (with an.MET extension) as an email file attachment and displays the Compose Mail Message dialog box. Enter the email address where you would like the transfer sent. See the

Maximizer Help topic, Receiving Maximizer Data by Email, for detailed instructions on receiving a transfer by email.



Transfer Summary Reports and Logging

Each time you transfer Address Book entries, Maximizer displays a transfer summary report. The report indicates the number of data items inserted, modified, bypassed, and deleted. It also displays the transfer setting used and other related information. You can print this report for your records.

As well, for each Address Book entry updated in the target Address Book, Maximizer can, optionally, add a note. The note summarizes the fields that have been added, changed, and deleted. This feature can also be used if you want to find the data that has been added or modified. After a transfer, simply do a search by notes.

CHAPTER 11

Reporting and Graphing

Report and Make Graphs on the Progress of Your Business

In this chapter...

"What is Reporter?" on page 412

"Crystal Reports" on page 416

"Printing Reports from Maximizer" on page 419

"Exporting Entries to Microsoft Excel" on page 421

"Graphing and Charting with Maximizer" on page 422

What is Reporter?

You can get help while using Reporter by selecting Help > Contents.

The success of any marketing strategy or campaign depends on the ability to monitor your progress and some sort of a built-in improvement mechanism. Using the vast flexibility of Reporter, you are guaranteed increasing effectiveness. No matter where you are in the world, you have access to what's going on in your company and the ability to report on real-time statistics.

Generate Your Reports Anywhere

Reporter is available if you are running Maximizer on a SQL database. Check with your system administrator.

Reporter's flexibility allows you to generate reports from any Internet-connected computer. When you open Reporter in Maximizer, your list of reports is displayed inside the browser window. This is the normal mode of using Reporter and requires no additional setup by your system administrator.

Because Reporter is HTML-based, you can access your reports from anywhere in the world, provided you have met the following conditions:

- Your computer has an Internet connection and a web browser.
- Your system administrator has configured Microsoft Internet Information Server to allow external access to Reporter.

Your list of reports appears in a web browser much as it does within the Reporter module.

Print, Save, and Edit Your Reports

After generating a report, you can easily print the report to your local or network printer. You can also save your reports to a file in one of a few popular formats for later editing. These file formats include Crystal Reports, Microsoft Word, Microsoft Excel, and Rich Text Format.

Access Reporter Through a Web Browser

Contact your system administrator to find out the URL (the address) of Reporter.

If you have access to Maximizer Web Access, click the Reporter icon.

Reporter is designed so you can generate reports on your data via the Internet or your company's intranet. You only need a computer with an Internet (or intranet) connection and a web browser, such as Internet Explorer or Netscape Navigator.

In the case of Internet access, your system administrator must configure your Microsoft Internet Information Server (IIS) to allow external access to the “Reporter” virtual directory; otherwise, Reporter is only accessible internally (within your company's LAN).

Intranet Access

If you are on the same network (LAN) where your IIS server is located, you can open your browser and type the following into the Address field:

http://<Server Name>/Reporter/Start.asp

The "<Server Name>" is the computer name of the IIS server on your company's network. If you know the server's IP address, you can enter that in place of the server name.

Internet Access

Reporter is only accessible via the Internet if your system administrator has configured the IIS server to allow external access to Reporter. For security reasons, external access to Reporter may not be desirable. At an Internet-connected computer, type the following in your web browser's Address line:

http://<Server URL>/Reporter/Start.asp

The "<Server URL>" is the domain URL or IP address of your company's IIS server.

Generate Reports using Reporter

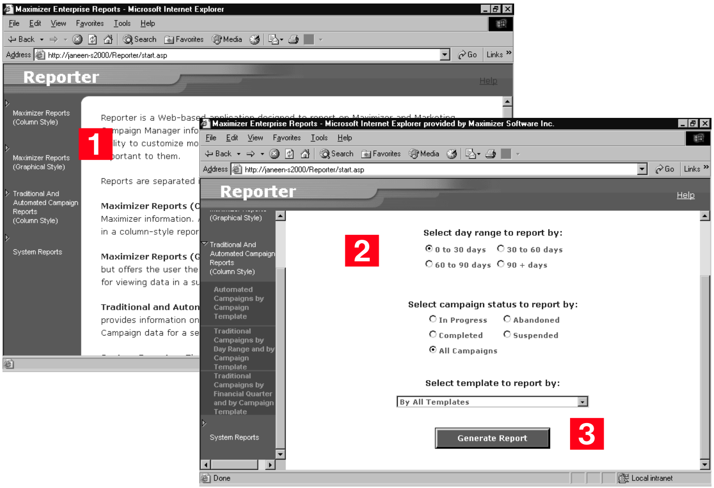
For a more detailed description of the report types available in Reporter, open Reporter Help and look up "Report Types" in the index.

Reporter's browser-based window allows you to easily select and print the report you want. The navigation bar organizes the many pre-formatted reports by subject. Reports on your Address Book entries and opportunities are listed under "Maximizer Reports (Column Style or Graphical Style)". Similarly, you can obtain reports on your marketing activities under Traditional and Automated Campaign Reports. In addition to column style reports, Reporter can print graphs on your opportunity and campaign information.

➤ To generate reports in Reporter

1. Click a **report heading** to see the reports that are available. The system reports relate specifically to system administration.
2. For each report you generate, specify the **report options**. Some reports require you to choose a financial quarter and a year, others—such as team reports—ask for opportunity status, team leader, or perhaps a date range.

3 Click the **Generate Report** button once you have specified your options.



With the selection of pre-formatted reports available in Reporter, you can produce many sales and marketing related reports and graphs.

Print and Export Reports

You can integrate custom Crystal Reports with the Reporter module. See the *Maximizer CRM Administrator's Guide* for more information.

➤ To print or export the report

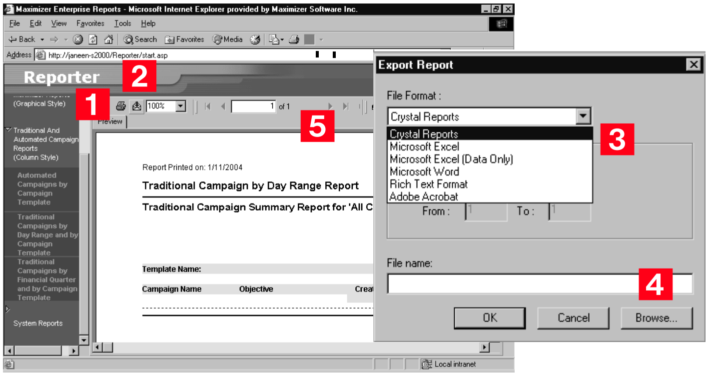
1 Click the **Print Report** button to print the report.

2 Click the **Export Report** button to export the report.

3 You can export your report in one of several formats. Choose the desired format if you are exporting the report.

4 You can also update an existing report by clicking the **Browse** button and choosing an existing report.

5 In the generated report, you can use this toolbar to navigate between pages in the report and perform other actions.



Crystal Reports

Crystal Reports supports up to 256 linked views when using Microsoft SQL.

The Crystal Reports viewer is installed automatically with Maximizer and is accessible from the Reports menu. To create or modify reports, you must have the full Crystal Reports program installed.

Maximizer installs a set of standard Sales and Customer Service reports, but you can also create your own custom, shared reports and save them in the MaximizerReports folder (in My Documents) where they can be accessed from the Reports menu.

Create and Access Corporate Reports

The Maximizer installation provides a standard report set consisting of Sales, Marketing, and Customer Service reports. These reports provide out-of-the-box reporting.

The Maximizer CRM Server installation creates the...\All Users\Application Data\Maximizer\SvrShare\Reports\<Address Book name> folder, which contains shared reports. All folders and reports within this folder are accessible from the Reports > Crystal Reports menu in Maximizer.

➤ To launch Crystal Reports

- You can launch Crystal Reports through the Reports > Crystal Reports > Personal > Custom Reports menu item in Maximizer or through the Crystal Reports program menu.

➤ To create and access a corporate Crystal Report from Maximizer

1. After you have created your Crystal Report, save it in one of the following folders that are created by the Maximizer installation:
   - Documents and Settings\All Users\Application Data\Maximizer\SvrShare\Reports\<Address Book name> folder\Sales
   - Documents and Settings\All Users\Application Data\Maximizer\SvrShare\Reports\<Address Book name> folder\Marketing
   - Documents and Settings\All Users\Application Data\Maximizer\SvrShare\Reports\<Address Book name> folder\Service

Alternatively, create a folder on the Maximizer server in the following location if you would like to create your own reports folder:

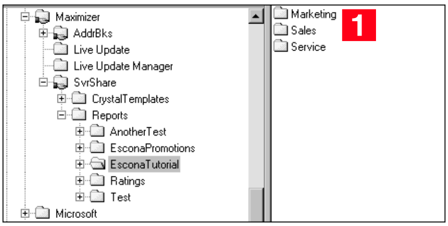
- Documents and Settings\All Users\Application Data\Maximizer\SvrShare\Reports\<Address Book name> folder\

If you are upgrading Maximizer from a previous version and you have old reports in the Crystal Reports file structure for Maximizer, the old reports will appear in an archived folder named after the Address Book with a.BAK file extension where your other report files for Maximizer are stored – e.g., Documents and Settings\All Users\Application Data\Maximizer\SvrShare\Reports\<Address Book name>.BAK folder. You can copy the reports to any of your working folders, such as the Sales folder, to access the reports from Maximizer.

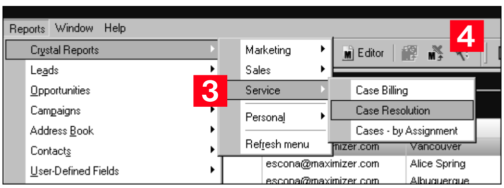
If you create your own folder, it appears as one of the submenu items under the Crystal Reports item.

2 **Copy** or **save** the report file in your custom folder, or in the Sales or Service folder.

3 Select **Reports > Crystal Reports > Refresh**. If you created a folder, it is displayed as one of the available report types (submenu item) and your report is available in the folder where you saved the report.



4 To access a custom report, simply choose it from the **Reports > Crystal Reports** menu. For example, choose the report from the Sales or Service submenu.



Note that for MaxExchange remotes, these reports are installed in the following folder:

Documents and Settings\All Users\Application Data\MaximizerGlobalReports

Create and Access Personal Reports

In order to launch Crystal Reports from the Crystal Reports > Personal > Custom Report menu, you must be part of the Crystal Report Users security group. See the *Maximizer CRM Administrator's Guide* for more information.

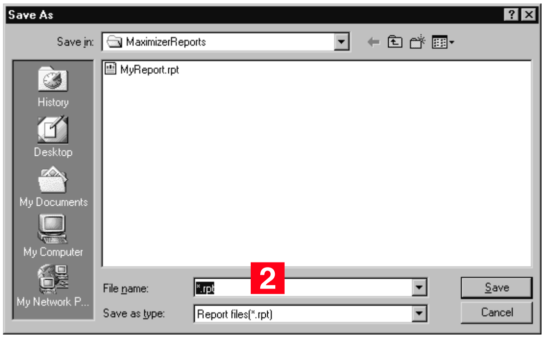
Maximizer CRM installations also create the local folder ...\My Documents\MaximizerReports. This local folder is the default location for a user's personal report templates.

The File > Print > Custom Reports command enables you to create new report templates, edit existing report templates, and to view reports using existing report templates. The Custom Reports command is also available from the Reports > Crystal Reports > Personal menu.

➤ To create and access a personal Crystal Report from Maximizer

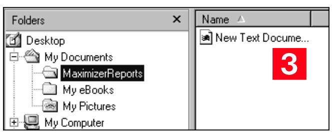
1. Create a custom report by choosing **Create a new custom report template** from the Custom Report dialog box (Crystal Reports > Personal > Custom Report).

2. You are prompted to enter a **report name**. By default, the report is saved in ...\My Documents\MaximizerReports.



You are prompted with a login screen when previewing a new report or modifying an existing report. Enter your **Maximizer user name** and **password**.

3. Create the report in Crystal Reports and save the report file in the MaximizerReports folder on your local drive.

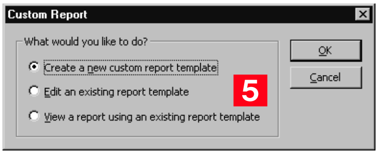


If you create your own folder, it appears as one of the submenu items under Crystal Reports > Personal.

4. Select **Reports** > **Crystal Reports** > **Refresh**.

5. To access a custom report, choose the report from **Crystal Reports > Personal**. Alternatively, you can select Personal > Custom Report from the Reports > Crystal Reports submenu and choose the **View a report using an existing**

report template option in the Custom Report dialog box. If you would like to edit the report template, choose **Edit an existing report template**.



Printing Reports from Maximizer

Column reports are a fast way to print Maximizer information as it appears in your current list, while a Detailed report lets you print more detailed information. Other reports, such as the Notes, Name/Address/Telephone, and Overdue Cases by Queue reports, allow you to print specific information about your Address Book entries, opportunities, campaigns, and customer service cases.

If you need to print more complex reports on your Address Book information, try using Reporter.

You can print your calendar appointments as a Calendar Book or Appointment Calendar. You can print a Personal Organizer from the Address Book, Contacts, Related Entries or Hotlist window.

You can print reports from the Reports or File > Print menus. The Reports menu gives you access to every type of Maximizer report, irrespective of the window that is open. For example, if you are in the Address Book window, and want to print an opportunity report, select Reports > Opportunities > [type of report]. The Opportunities window automatically opens and the report extracts information from the current opportunities list. The File > Print menu item prints reports strictly related to the window that is currently open.

The Reports menu allows you to print reports on the following Maximizer information:

- Address Book entries
- Sales leads
- Contacts
- User-defined fields
- Notes
- Opportunities
- Campaigns
- Customer service cases
- Documents
- Hotlist

- Calendar
- Knowledge base articles
- OrderDesk
- Journal entries
- Expenses
- Related entries
- Activities
- Phone log

The following is a summary of some of Maximizer's reports:

- **Column Report** – displays the same information you see displayed in a controlling window, such as names and addresses or opportunity information.
- **Detailed Report** – includes mailing address information, appointments, Hotlist tasks, user-defined fields, Contacts, document summaries, and notes for an Address Book entry or opportunity. A detailed report for a customer service case includes mailing address information, user-defined fields, Contacts, document summaries and notes.
- **User-Defined Field Report** – lists the user-defined fields attached to each of your Address Book entries.

The Opportunities Executive Report generates many HTML files for its web browser interface. Save this report to a separate folder to keep your files organized.

- **Executive Report** – generates a highly detailed HTML-based report on all of your opportunities.
- **Forecast Analysis** – provides a summary of the probability of a successful close, the potential sales revenue, and the weighted amount associated with each active opportunity in the opportunity file.
- **Sales Alert Report** – provides a summary of the opportunities that are behind schedule.
- **Analysis Reports-Detail** – lists the opportunities by status with a revenue total.
- **Analysis Reports-Summary** – reports the number of opportunities by status with total revenue.

While all Maximizer reports can be sent to a printer, you can additionally generate .RTF (Rich Text Format), .PDF files (Portable Document Format) for most reports in Maximizer. You can also preview most Maximizer reports.

Exporting Entries to Microsoft Excel

Microsoft Excel must be installed to be able to export entries to Excel.

You must have the “Allow export” Access Right enabled in your user account to be able to export entries to Excel.

Maximizer enables you to quickly and easily export selected entries from a Maximizer window to a Microsoft Excel spreadsheet. Maximizer exports the currently selected entries for the active controlling or following window using the columns displayed in that window. If no entries are selected, it exports all displayed entries.

If the column setup includes multiple fields in a single column, each field is displayed in a separate column in Excel, with each column named after the Maximizer field name.

If the column setup includes a table user-defined field, multiple table items are combined into a single cell in Excel.

Users of Excel 2007 or later have the option of performing an advanced export to Excel. This option lets you apply conditional formatting to numeric user-defined fields. You can choose the same data bars, color scales, and icon sets that are available in Excel. See the Excel documentation for more information on conditional formatting.

Note that reports exported to Excel are not dynamic, meaning they will not automatically update when changes to the exported entries are made. To update an exported report, repeat the export process.

➤ To export to Excel

1. Select the window to export entries from.
2. Create a list of entries or select specific entries to export.
3. Select a column setup to use for the export.
4. Click the **Export to Excel** button or the **Advanced Export to Excel** button (Excel 2007 or later) on the toolbar.

   – or –

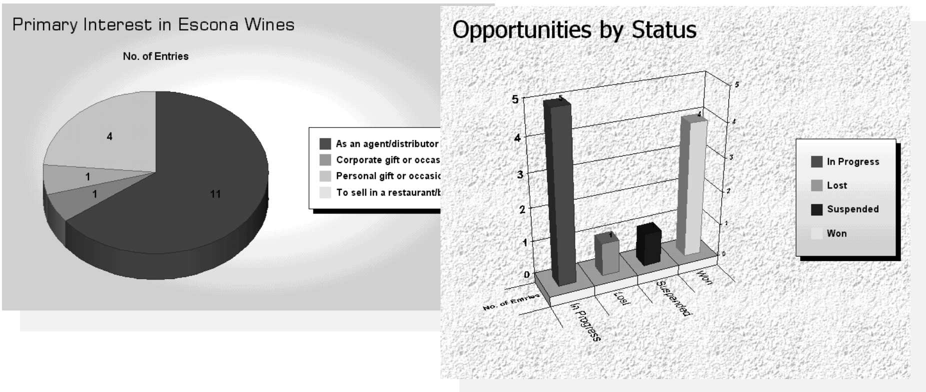
   Select **Tools** > **Export to Excel** or **Tools > Advanced Export to Excel** (desktop application only).
5. If you are performing an advanced export to Excel, the **Advanced Export to Excel** dialog box opens. Select the conditional formatting to apply to each column. Only columns that display numeric user-defined fields are listed. To apply the conditional formatting to total cell, as well as the summed cells in the column, select the **Include Totals** checkbox.

   Excel opens and displays the selected entries.
6. To keep the report, save it to your computer with a unique file name.

Graphing and Charting with Maximizer

Creating a good presentation is about having good information and presenting it well. When you need to create attractive and meaningful graphs or charts for your presentation, and you need them quickly, Maximizer can do the job.

Maximizer gives you the ability to track your customers and find out who they are. Gathering relevant customer information is a key component of successful marketing and ecommerce initiatives. With the creation of meaningful graphs and charts on your Address Book data, you benefit from complete, detailed intelligence to evaluate the performance of your business.



When you graph your entries, you generate the graph using the entries listed in the Address Book or Opportunities window. For example, if your Address Book window currently lists all Address Book entries between A and M, only those entries will be graphed.

Once your list contains the entries you are trying to graph, click the Graphing button or choose Graphing from the Tools menu to begin the process of constructing your graph. You can graph any table or date field in your Address Book, such as City/Town, State/County/ Province, Opportunity Status, to name only a few, and any table or date user-defined field.

Maximizer creates graphs and charts for all kinds of purposes. You can print your completed graph from Maximizer or save it as a high-quality image file that you can use in documents and presentations.

If you often create the same type of graph, you can save a graph template to a catalog, which you can retrieve at any time. You can even add a custom button to your Maximizer toolbar that instantly creates a graph from one of your saved templates.

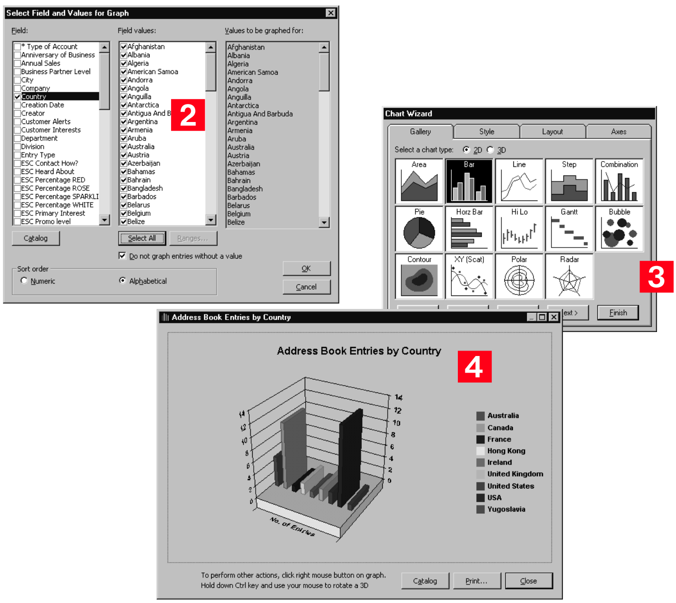
The Chart wizard walks you through the steps of creating a graph or chart. You can then edit the final product to make it look attractive.

Graph Your Address Book Entries or Opportunities

Generating a graph from your current list of entries is a simple process.

➤ To create a graph

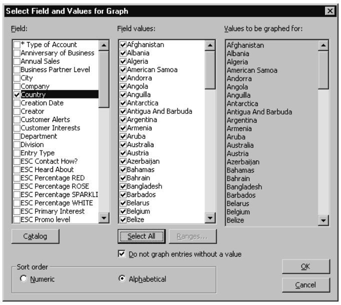
1. Create the desired list of entries in the Address Book or Opportunities window, and then click the **Graphing** button. Alternatively, you can select **Tools > Graphing**.
2. Choose the fields and values you are graphing. For example, you could graph Address Book entries by the City/Town or State/County/Province field. Defining the values lets you narrow the range or selection of values to graph.
3. Use the **Chart wizard** to choose the graph type, style, and layout.
4. Edit your graph in the **Graphing** window. You can change the appearance of your graph and edit the data. From this window, you can also save your graph as an image file.



Select the Fields and Values for Your Graphs

Press F1 in the Select Field and Values for Graph dialog box to learn more about making your selection.

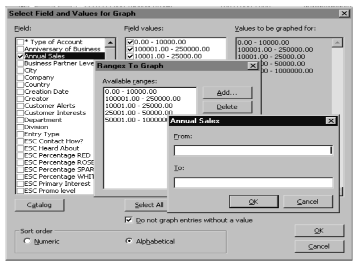
When you click the Graphing button, Maximizer prompts you to choose a field to graph. Your choice of fields depends on the type of entries you are graphing. If the Address Book window is active when you begin graphing, you choose from Address Book entry and user-defined fields, such as Company, City, or State. If the Opportunities window is the active window, you choose from opportunity fields and user-defined fields, as in the Status, Team Leader, or Objective. You can graph any Address Book entry or opportunity field. Some field types require that you specify a range to graph, as in a range of amounts for "Annual Sales".



This example shows the Country Address Book entry field with all possible values selected for graphing.

Each range you provide becomes an item on the X-axis of your graph. If you defined your ranges for the "Anniversary of Business" user-defined field as January-June and July-December, you would have two columns in a bar graph (or two wedges in a pie graph).

Maximizer lets you choose a range of values to graph for the field you select. For a table field, such as City/Town, you simply select the table items you want to include in the graph. Other field types—alphanumeric, numeric, or date fields—require you to enter a range. For example, if you select "Anniversary of Business", you would have to provide the date ranges to include in the graph. This allows you to include only the area of interest.



Click the Range button to specify a range (or ranges) of values for non-table fields.

Finally, choose numeric or alphabetical as the sort order:

- **Numeric** displays charted values in numeric order, from lowest to highest. For example, if you choose a bar chart to graph the values of the City/Town field, the city/town (value) assigned to the least number of Address Book entries is shown on the left of the chart while the city/town assigned to the most number of entries is shown on the right. The legend will list the cities/towns in numeric order.

- **Alphabetical** displays charted values in alphabetical order, from A to Z. For example, if you choose a bar chart to graph the values of the City/Town field, any city (value) that starts with A is shown on the left of the chart while any city/town starting with Z is shown on the right of the chart. The legend will list the cities in alphabetical order.

Define the Appearance of Your Graphs

After you choose the field and values for your graph, the Chart wizard opens so you can define the characteristics of your graph. The Chart wizard has four tabs for defining your graph appearance:

- **Gallery** – choose flat (2D) or perspective (3D), and the chart type (Area, Bar, Pie, etc.).
- **Style** – choose the style based on the chart type you chose in the Gallery tab.
- **Layout** – specify the title, footnote, and legend settings.
- **Axes** – label your graph's axes.

These are only the basic characteristics of your graph—after the graph is generated, you can make additional changes to its appearance and even edit the graph data.

Use Title and Footnote Merge Fields

When you save a graph to the Graph Catalog, you can insert title (header) and footnote (footer) merge fields that display information such as the current date and time, the total number of entries, and other information.

For example, inserting "date" in the title of the graph and then saving the graph to the catalog as a template tells Maximizer to display the current day's date the next time you generate the graph.

The following fields are available for footers and headers:

- **[count]** The total number of entries graphed.
- **[date]** The date the graph is generated.
- **[login]** The user ID of the logged-in user.
- **[time]** The time the graph is generated.
- **[user]** The name of the user specified in the Users dialog box in Maximizer.

➤ To insert a title or footnote merge field

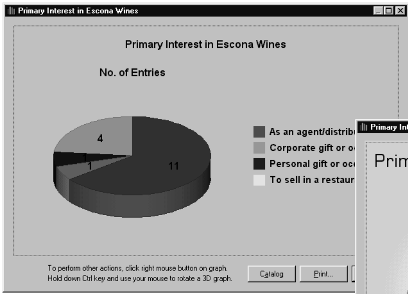
1. Start a new graph.
2. In the Chart wizard, select the **Layout** tab.
3. Enter any fields you want to appear in the **Chart Title** and **Chart Footnote** fields. Remember to surround the field with square brackets, [like this].
4. Finish creating your graph and save it to the **Graph Catalog**.

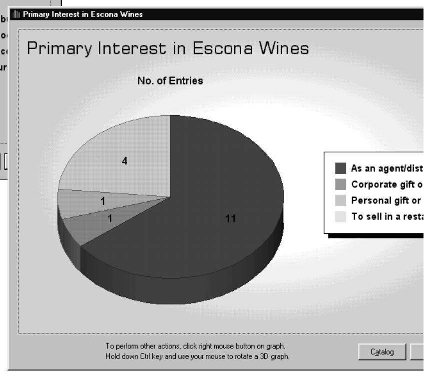
   The first time you create the graph, the field name will display, not the value (i.e., [user] instead of "Bob Smith"). The next time you generate the graph, the value will display correctly.

Add "Zip" to Your Graphs

Press F1 in the Graphing window to find out more ways to edit your graph.

At first, your completed graph may not look like much—by default, it has a plain gray background and the graph's colors are chosen for you. You can easily add your own touches to your graph by editing it in the Graphing window.



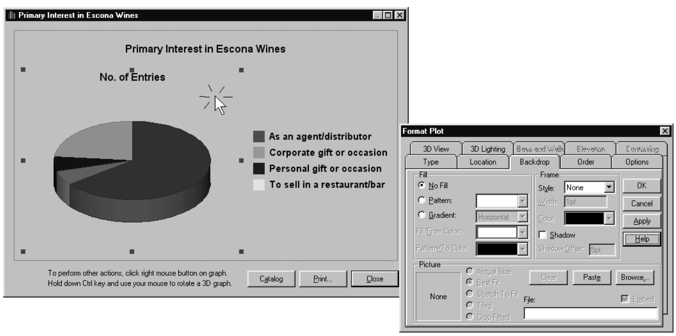


Before and after—the graph as generated by Maximizer (above) and the graph after some editing (right).

You can also right-click inside the graph to display a pop-up menu.

You can select and edit each element in the graph, such as the title, legend, or even the bars in a graph. The background, for example, can be a solid color of your choice, a gradient, or a "wallpaper" image. Simply select and double-click the element that you want to edit to display a setting dialog box.

A background color can make a plain graph look attractive. To change the background properties, double-click within the area of the graph (but not on the graph itself) so that "selection handles" appear around the graph as shown below. The Format Plot dialog box lets you make many changes to your graph.

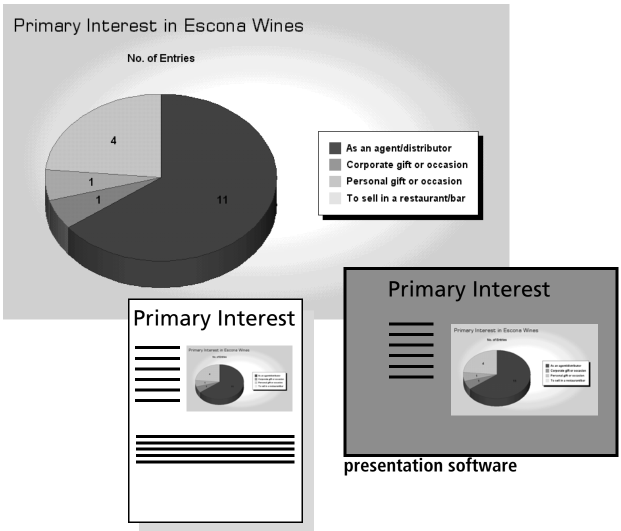


Click the Help button in the Format Plot dialog box for help using any of the settings.

You can use this same procedure to change many of the graph elements. Try single-clicking different elements to see which ones show the selection handles; if selection handles appear, you can double-click it to edit that element.

Use Your Graph in Other Applications

If you are making a presentation, you will probably want to use your graph in handouts or in an on-screen presentation. You can save your graph as an image file that you can use in other applications, such as word processors, spreadsheets, presentation software, and more.



When you save your graph, you have a choice of two image file types: Windows Metafile or Windows Bitmap. If you think you will have to resize the image when you insert it into your document or presentation, you might want to use the Windows Metafile format, as it is “scalable”—you can resize it without getting any jagged edges.

Reuse Your Graph Settings

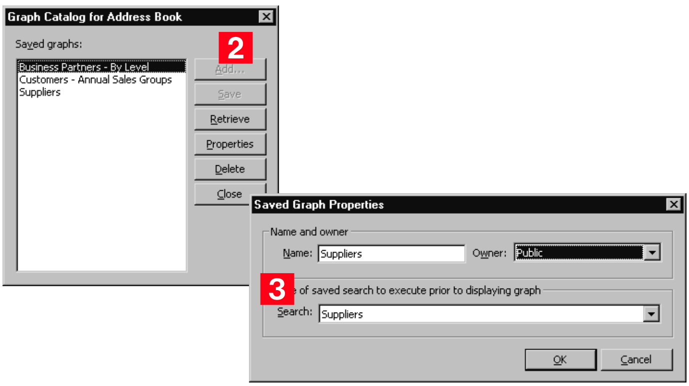
If you find yourself often creating the same type of graph, save yourself some time by saving the graph settings as a graph template in the Graph Catalog. After you generate the graph, use the Catalog button to save your graph template.

Graphs for Address Book entries and opportunities are stored in separate catalogs; the available catalog depends on whether the Address Book or Opportunities window is selected.

➤ To use the graph catalog

1. In the Graphing window, click the **Catalog** button to open the graph catalog.
2. Click the **Add** button to add your graph to the catalog.
3. Type a descriptive name and choose Public as the **Owner** to make the template available to all users.
4. If you have a search saved in the search catalog, select it in the search list to have Maximizer perform the search before generating the graph.

Ensure that access rights to the saved search are adequate. If users do not have read access to the search, they will not be able to generate the graph. For detailed information on saved search properties, see F1 Help.



Once your graph template is saved to the Graph Catalog, you can use the template when you next create a graph.

CHAPTER 12

Using eStore Manager

Build and Publish Your Online Catalog

In this chapter...

"What is eStore Manager?" on page 432

"Main Window" on page 433

"Getting Your Catalog Online" on page 434

"Designing Your Catalog's Appearance" on page 435

"Letting Your Visitors Know How to Contact You" on page 438

"Choosing How to Accept Payment" on page 440

"Building Your Catalog" on page 442

"Making the Finishing Touches and Preview Your Catalog" on page 447

"Publishing Your Catalog on the Internet" on page 448

"Adding Linking to the eStore Catalog" on page 450

"Your Customer's eStore Experience" on page 451

"Enhancing Your Catalog with the Catalog Search Page" on page 454

"Managing Your Online Orders and Inquiries" on page 455

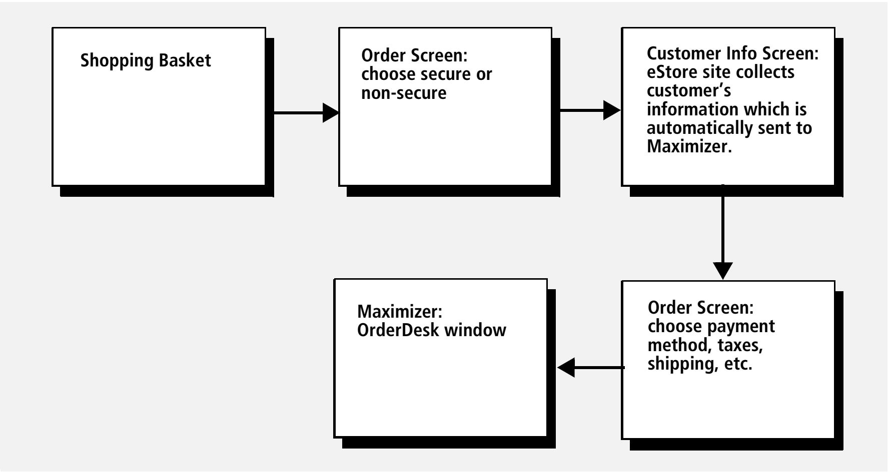
What is eStore Manager?

If you have installed the Escona sample Address Book, you may want to review the Escona Online Catalog as an example of an eStore.

eStore Manager is a Maximizer tool for creating and publishing your online store.

eStore includes everything you need for an Internet storefront—a catalog, shopping cart, and online credit card transaction processing. eStore gives you plenty of flexibility in adding product descriptions, product images, pricing, applicable taxes, and shipping costs. Setting up your eStore online catalog is a breeze.

This diagram shows how an order is created starting with the website visitor's shopping cart and finishing in the OrderDesk.

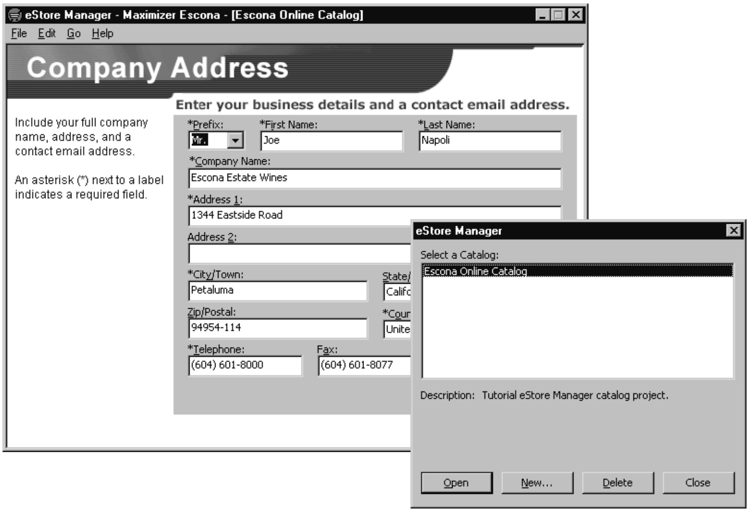


Your online catalog is integrated with Address Book entries and campaigns so your customers' buying experience is customized each time they visit.

Main Window

? Press F1 in any screen or dialog box for help.

eStore makes it easy to construct your online catalog—using a series of wizard screens, you provide eStore with all the information needed to build the catalog.



Getting Your Catalog Online

eStore makes it easy for you to create and publish your online catalog. To get your catalog online, you need to perform these steps:

1. **Create the template for your online catalog**.

   A template is an HTML page used by eStore to control the appearance of your catalog. The template contains special eStore tags that are replaced by catalog content when you publish the catalog. Your order screens—the screens that display a summary of the customer's order—can also be customized. See "Designing Your Catalog's Appearance" on page 435.

2. **Build and publish your online catalog**.

   eStore's wizard screens take you through the steps of building your online catalog and publishing it on the web. These steps include providing information about your company, setting up payment methods, and adding catalog sections and items. When you finish building your catalog, the last step is to preview and publish the catalog.

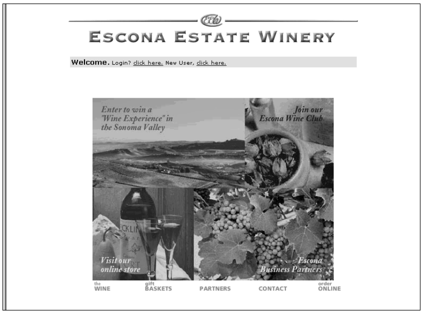
3. **Add links from your company's website to the eStore catalog**.

   The final step is the simplest—add a link (or several, if you like) from your company's website to your online catalog. See "Adding Linking to the eStore Catalog" on page 450.

For an example of a completed online catalog, see the Escona sample Address Book that comes with Maximizer.

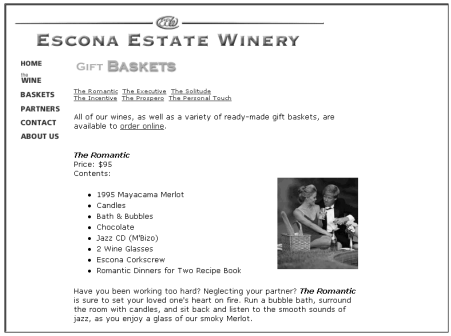
Designing Your Catalog's Appearance

The design of your online catalog is saved as template in an eStore project. Your company probably has a standard layout for its website, so you might want to create a template that uses the same layout.



You can design your catalog template to look like your company's website. Just insert the catalog tags in the correct places. This is an example of what a catalog template may look like.

In the completed catalog, eStore replaces the tags with the contents of your catalog. This example shows a detailed product description page from the Escona sample Address Book.



The template is simply an HTML file that contains special eStore tags. You can make your page look any way you like, as long as you insert your eStore tags in the right location. You select your catalog template before you preview and publish your eStore catalog.

The Catalog Template Tags

For visitors to find your site with Internet search engines, you must register your site with each search engine.

Your HTML template must contain the following tags:

- **[THE_META_TAGS]** - Insert this tag between the Head tags in your HTML file. At the time you publish your catalog, eStore replaces this tag with the correct keyword meta tags, which allow visitors to find your site using Internet search engines. The keywords in these meta tags are your business classification keywords.

  <HEAD>[THE_META_TAGS]</HEAD>

- **[THE_HEADER_SCRIPT]** - Insert this tag between the Head tags in your HTML file. This tag is replaced by the eStore Javascripts that are needed on certain pages of the site.

  <HEAD>[THE_HEADER_SCRIPT]</HEAD>

- **[THE_BODY_TAGS]** - Insert this as an element within the Body tag. This tag is used to automatically run eStore Javascript functions.

```
<BODY [THE_BODY_TAGS]></BODY>
```

- **[THE_CATALOG]** - Insert this tag between the Body tags where you wish to place the main body of your catalog, which should be the main portion of your page. This tag is replaced by the catalog content.

```
<BODY>[THE_CATALOG]</BODY>
```

You can greatly enhance the capabilities of the search page by installing the "Full Text Search" SQL component. See the *Maximizer CRM Administrator's Guide* for more information.

- **[SEARCH]** - Use the Search tag in place of a URL in a link. When your site is published, clicking this link opens the eStore catalog search page, which allows the visitor to search your catalog for specific items. This link can be placed anywhere in the Body of your template.

```
<BODY><A HREF="[SEARCH]">Link text</A></BODY>
```

- **A link to "Basket.asp"** - In any location in the Body of your catalog template, include a link to "Basket.asp". When a customer clicks on this link, Maximizer displays the current contents of the customer's shopping basket, where the customer can choose to order the items in the basket. The file "Basket.asp" is dynamically generated by eStore.

```
<BODY><A HREF="Basket.asp">Link text</A></BODY>
```

Create the Catalog Template

Create the template using your preferred HTML editor, making sure that you add the eStore template tags in the appropriate places in your markup.

Below is a sample template file that may be used by eStore.

You can use this example as a starting point for your own template. Keep adding to this basic template until you are satisfied with its appearance.

```
<HTML>
<TITLE>Catalog</TITLE>
<HEAD>
[THE_META_TAGS]
[THE_HEADER_SCRIPT]
</HEAD>
<BODY [THE_BODY_TAGS]>
<P><A HREF="[SEARCH]">Search the catalog</A>
<P><A HREF="basket.asp">Your shopping basket</A>
<BR>
[THE_CATALOG]
</BODY>
</HTML>
```

Sample Catalog Templates

eStore lets you select a sample catalog template in the Online Layout screen by clicking the "Samples..." button and choosing the name of a template. Additional files, including graphics, are listed in the

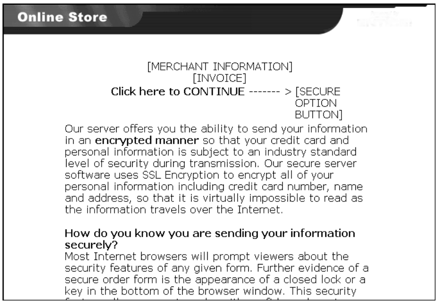
"Additional files used by template file" pane. You can then preview or publish your site using the sample template.

Or use the Browse button to select your own template. Use the Add button to bring in additional HTML files and graphics. To learn more about using the Online Layout screen, see "Making the Finishing Touches and Preview Your Catalog" on page 447.

Customize the Order Screen and Confirmation Email

? To find out how to modify your order screens or email templates, open the eStore Help and look up "order screen templates" in the index.

The order screen uses HTML templates similar to the catalog template. Although the order screen that comes with Maximizer works well, you may wish to customize the order screen to use your company's logo or to match your company's website.



This is an example of one of the default order screen templates ("SecureOption.html"). The tags (in square brackets) are replaced with the appropriate information at the time the order is made.

This is the order screen as it appears at the time the order is made. Notice that the text in square brackets is now replaced with order information.

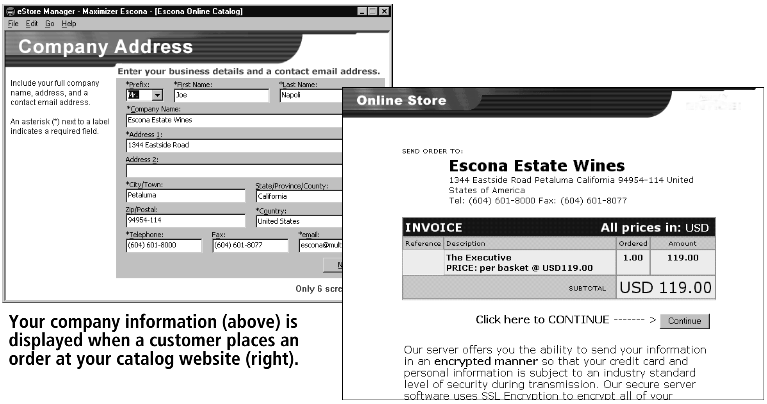
After a successful order, eStore sends a confirmation email message to the customer.

Letting Your Visitors Know How to Contact You

The first two screens in eStore collect basic information about your business or organization. eStore uses this information in your online catalog and the order screens.

Enter Your Business Contact Information

The company address and phone numbers that you enter in the first screen are used in the order screens—when a visitor orders an item, Maximizer displays a summary of the order along with your business name and address.



Your company information (above) is displayed when a customer places an order at your catalog website (right).

Select Keywords for Internet Search Engines

One of the principal ways that customers will find your site on the Internet is through Internet search engines, such as Lycos, Yahoo, Alta Vista, and others. Keywords identify to the Internet where you fit in as a business. The Business Classification screen allows you to specify keywords and keyword phrases that assist people in finding your website.

Take your time developing this list. The keywords you provide will directly affect the amount of traffic your site receives through Internet search engines. To ensure that the keywords you select attract the customers you want to your site, keep the following rules in mind.

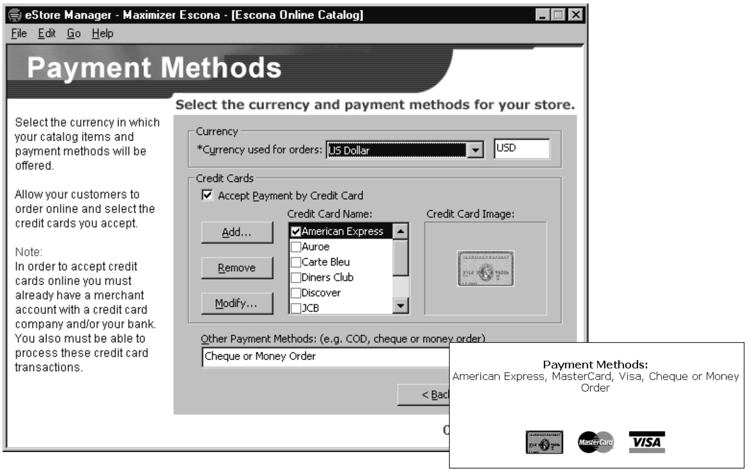
Keyword Rules

Due to technical constraints, some search engines consider repeating the same keyword multiple times during a submission to be "spam", and will filter out such submissions.

- Consider your customers. What words or phrases would they likely use to describe your business, products, or services?
- Use common terms (that is, terms that your customers would commonly use to describe your products).
- Use words that accurately describe your business and products.
- Use synonyms and related words. If your company makes sugar-free gelato, list "gelato" but list "ice cream" too.
- Include phrases and keyword combinations. Many people search for phrases such as "economy car rentals" as well as single words.
- Use the plural form of most keywords (farms, not farm) to capture those who search for the singular form as well as those who search for the plural form. Consider the spelling. If your business is a bakery, include both "bakery" and "bakeries".
- Use different forms or spellings (even common misspellings) of an important keyword.

Choosing How to Accept Payment

The Payment Methods screen allows you to specify the currency you will use for pricing and payment on your website. You can also choose whether you will accept credit cards and other payment methods when visitors place an order from your catalog.



In order to accept credit cards online, you must already have a merchant status account with the credit card company, your bank, or both. Once this is set up, you can manage credit card transactions through the OrderDesk window in Maximizer after the customer places the order in your online catalog.

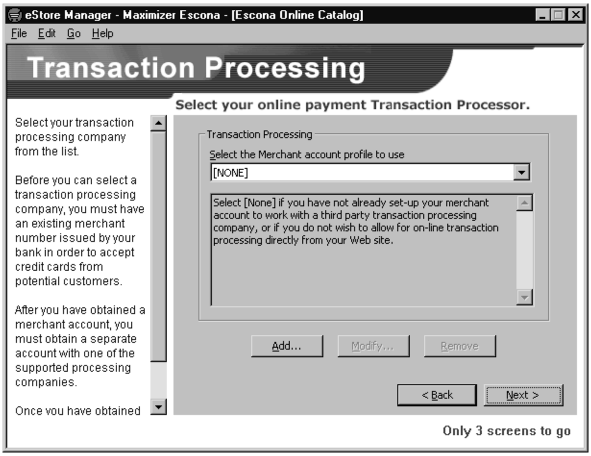
Set Up Online Transaction Processing

You are not required to use online transaction processing—if you wish to use an alternate means of credit card transaction processing, such as manually calling in the transaction, select "[NONE]" in the Transaction Processing screen.

If you have a merchant account with a credit card company or your bank, you may wish to set up online transaction processing. Once this is set up, credit card transactions are processed from your website and are tracked and maintained through the OrderDesk window in Maximizer.

When you create a payment gateway profile in eStore (or Maximizer), the profile will not immediately appear in an order's Payment & Totals tab or the Payment Gateway Profiles dialog box

until orders have been placed on your website and transferred by the eStore server to OrderDesk.



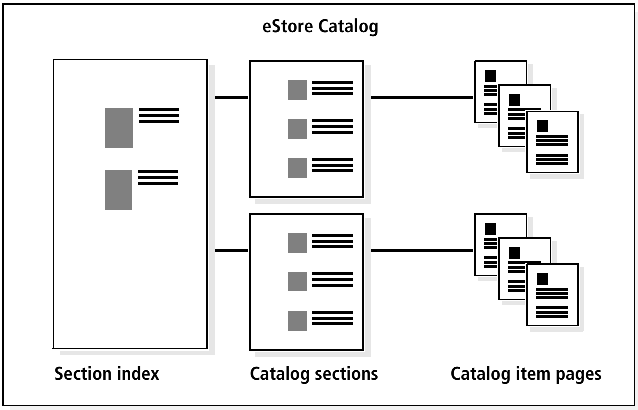
The method and procedures for online transaction processing will vary depending on the transaction processing company. Some may allow you to pre-authorize funds, process transactions after the product has shipped, and issue refunds. With another company, you may only process transactions—funds are taken directly out of a customer's account at the time of purchase. To find out about the transaction processing companies that work with Maximizer, please see the Payment Processing Gateways chapter or the Help.

Building Your Catalog

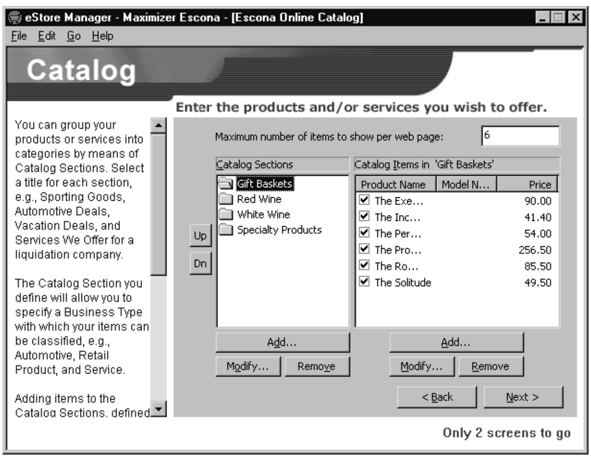
Have a look at the Escona sample Address Book for an example of an online catalog.

The Catalog screen displays a list of all the products and services in each section of your catalog. From this screen, you define sections for your catalog and enter catalog items for each section. You may include any number of products and/or services in your catalog with ample flexibility regarding the number of graphics, descriptions, or pricing schemes you use.

eStore catalog items are grouped into sections, which are listed in the published catalog's section index.



The left pane of the Catalog screen lists all the sections you have set up for your website. The right pane lists all of your items in the selected section. You must define a section before adding items to your catalog.

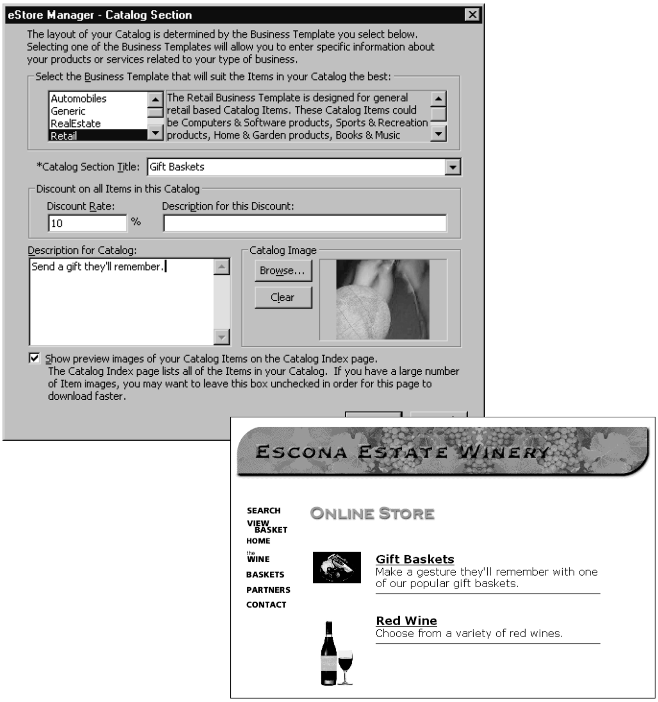


Add Sections to Your Catalog

If you create only one catalog section, eStore shows the catalog item list rather than a catalog section index.

A catalog section performs two functions. First, it allows you to organize the catalog items into similar groupings, which makes it easier for your visitor to browse your catalog. Second, the section controls the kind of information that eStore presents for the catalog items in that section.

When you create a new catalog section, eStore asks for a Business Template. The Generic Business Template might include virtually any type of product; Services could include any type of service; the Real Estate Business Template is best suited for homes and properties. Each of these types lets you enter item information that is best suited to the type of service or product you add to the section.



Add Items to a Catalog Section

To learn more about adding items to your catalog, see the eStore Help.

Catalog items are the products or services you are advertising or making available for sale on your website. Each catalog item is assigned to a specific catalog section and may include very specific information.

Add an Item with the Catalog Item Wizard

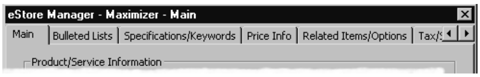
Click the Add button in the Catalog screen to add a new item with the Catalog Item wizard.

You add catalog items using a Catalog Item wizard; click the Add button under the Catalog Items section. The various screens allow you to enter item descriptions, details, specifications, pricing information, related items, and tax/shipping requirements, among others. You may also attach image or media files to specific catalog items.

Use the Inventory section to specify the number of items you have in stock. When the stock is depleted, the shopper sees a "Temporarily out of stock" message. Each time an item is purchased, the inventory is decremented by 1 in the eStore catalog; you should regularly check to ensure the inventory number is correct. You can choose to allow ordering when stock is depleted and the inventory will display in negative units.

Modify Catalog Items with the Tabbed Dialog Box

Click the tab you want and make changes to the catalog item. Click OK when you've finished your modifications.



When you modify an item entry, the Catalog Item wizard screens appear as several separate tabs in a comprehensive Catalog Item dialog box.

Enter the Item Information

For help on entering item information, open the eStore Help and look up "Adding Items".

The information that eStore requires for an item depends on the Business Template used by the section to which you are adding the item. A catalog section using the Real Estate Business Template, for example, will require an address for each catalog item, but other Business Templates would not require an address. Below is a listing of all possible the catalog item screens:

Not all screens are available for all catalog section types.

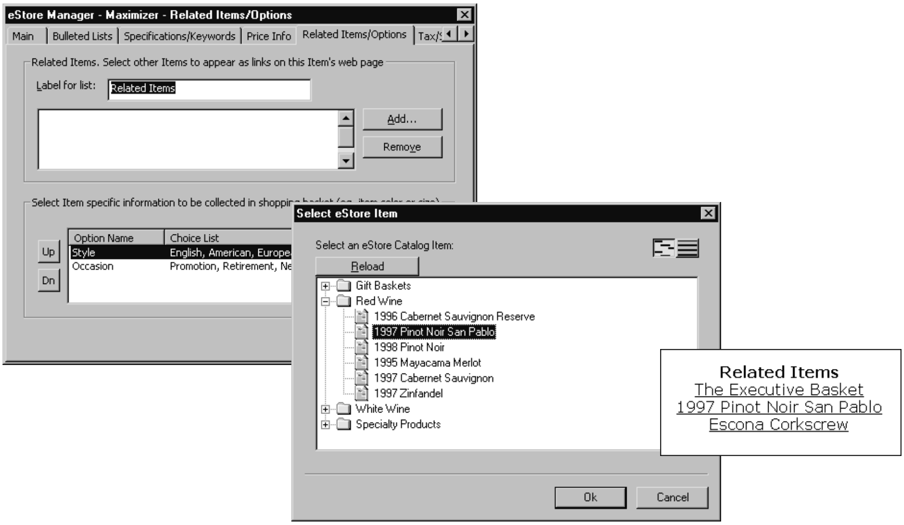
- **Address** – The address of the property.
- **Main** – The basic information for the catalog item. May include the name, description, and the main image.
- **Bulleted Lists** – The items you enter here will appear as a list on the catalog item's web page.
- **Features** – A listing of details about the item. These details appear as a bulleted list.
- **Specifications** – A list of the product's specifications. These specifications appear as a bulleted list.
- **Keywords** – The keywords let your customer find this item in a catalog search.
- **Details** – Size, weight, and other product information.
- **Images/Media** – This tab lets you include additional images, sounds, or animations for your product.
- **Price** – Information on how the item is priced.
- **Related Items** – This list appears on the items page, offering the customer the chance to upgrade or add onto their purchase.
- **Options** – Specify options such as size or color.
- **Tax/Shipping** – The shipping cost and tax calculations.

Upsell Your Product with Related Items or Options

Try to keep your list of related items to a few helpful—and strategic—suggestions.

An important feature of an eStore catalog is the ability to show the visitor a list of items or options that are related to the one he or she is viewing. You can use this feature to offer your customer an upgrade or an add-on to their purchase. If your customer is shopping

for a red wine, for example, you might also suggest wine glasses or a corkscrew.

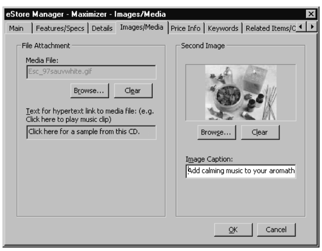


To open the Catalog Item dialog box, select the item in the Catalog screen and click "Modify".

You add related items using the Related Items/Options tab in the Catalog Item dialog box. This tab lets you browse your catalog for items to add to the list. In your published catalog, the related items appear as a list of links to each item's page.

Add Multimedia and Images to Your Catalog Items

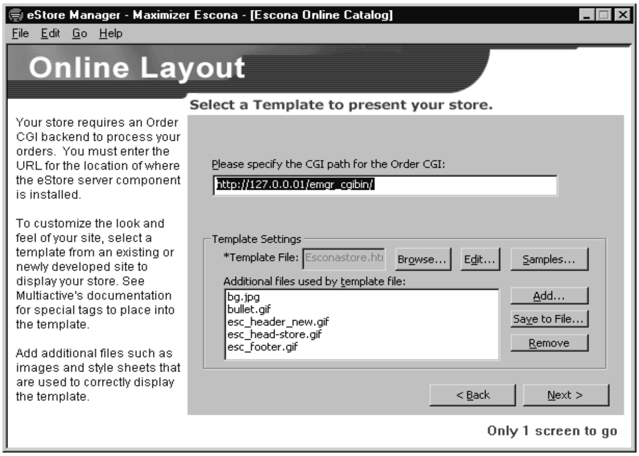
In the Catalog Item dialog box, use the Images/Media tab to add graphics, sound, or animations to your item's web page. Additional images of your product can help your customer get a "feel" for the item. This tab is not available for all Business Template types.



Making the Finishing Touches and Preview Your Catalog

Press F1 in this screen for help.

The Online Layout screen allows you to select a catalog template and edit additional catalog files.



Choose a Catalog Template

You can try one of the pre-made sample catalog templates—click the Samples button in the Online Layout screen.

Browse for the HTML template file you created for your online catalog. If the template uses additional files, such as graphics or media files, you must click the Add button to add them to the eStore project. If you make a change to your template, you must re-select the template so the updated template is added to your catalog project. You can then publish the catalog again.

Edit Additional Files

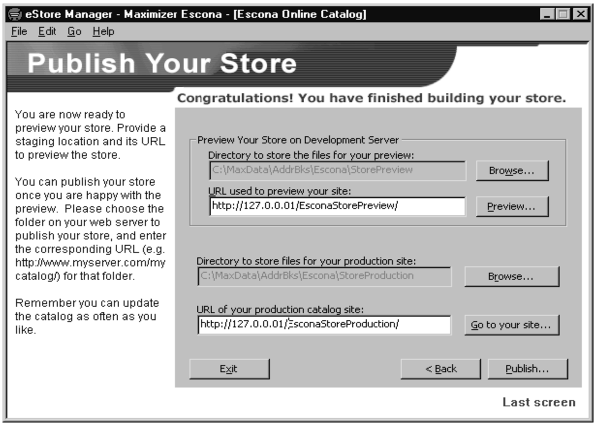
Files associated with the HTML template you are using display in the "Additional files used by..." list in the Online Layout screen. To edit a graphic, for example, select it, click Save To File, and specify a directory. Use a graphics editor like Paint Shop Pro or Photoshop to edit the graphic. Use the Add button to bring it back into the catalog database. The edited file will not overwrite the original if the names are identical; use the Remove button to delete the old version of the file before you add the new version.

Publishing Your Catalog on the Internet

? To learn more about publishing your catalog, open the eStore Help and look up "upload" in the index.

The final stage of building your catalog is to publish the catalog. Publishing the catalog is actually a very simple process—eStore generates the files that make up your eStore website, then copies them to a publicly-accessible folder on your company's web server (the computer running Microsoft Internet Information Server).

For security reasons, your production site—the site where you publish the catalog—may be on a different computer than your preview site.



Specify the Physical Location of the Catalog Files

Make sure you have two virtual directories set up on your IIS server: an internal virtual directory for previewing your catalog and a publicly-accessible virtual directory for the completed catalog. When you specify the location to store the files for preview, you specify the physical location of the preview folder on the IIS server (e.g., "\\servername\catalog"). A virtual directory "points" to the folder in which your catalog's website files are stored.

Enter the URL of Your Preview Site

Enter the IIS server's URL (or the IP address) and the virtual directory of your preview site. If you are working at the IIS server that hosts your site, you can enter "127.0.0.1" as the IP address. eStore uses this URL to display the preview site for you in your web browser.

An example of a URL using an IP address would be in this format: "http://xxx.xxx.xxx.xxx/catalogpreview", where "xxx" is the IP

address. You can also use a domain name (e.g., www.esconawines.com) in place of the IP.

As soon as you publish the catalog, visitors can go to your catalog using their web browser.

Adding Linking to the eStore Catalog

Setting up virtual directories is normally a task for a system administrator or someone familiar with Microsoft IIS.

The final step in getting your catalog online comes after you publish your catalog. When you publish your catalog, eStore copies the catalog website files to the folder on the IIS server that you specify in the "Publish Your Store" screen. You or your system administrator can set up a virtual directory in IIS that "points" to this physical folder. It is this virtual directory that is the URL—or the web address—of your catalog. For example, if you create the virtual directory "catalog" on your server, then your catalog's URL would be "http://www.yourserveraddress.com/catalog".

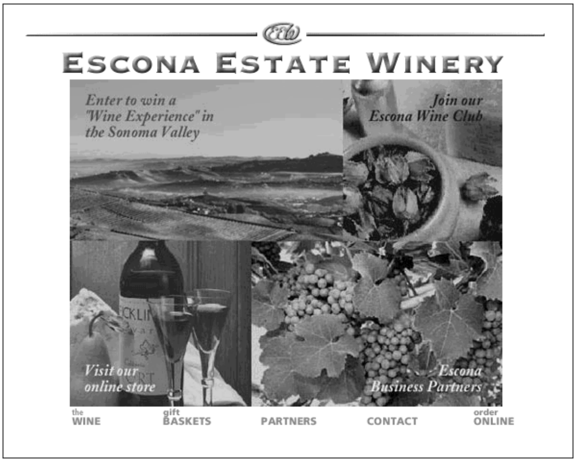
You can add links from your company's website—perhaps right in a navigation bar or menu—to the catalog's URL. For example, if you publish your catalog to "http://www.escona.com/catalog", you could include a link in your company's website like the following HTML example:

You can also use a relative URL, rather than the full URL shown here (e.g., "\catalog").

<A HREF="http://www.escona.com/catalog/">See our online catalog!</A>

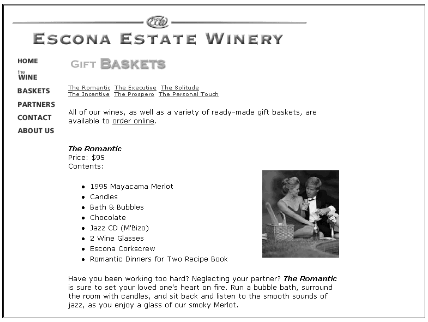
Alternatively, you can use a graphic in place of text in your link, as shown in the example below.

This is an example of what your site could look like.



Your Customer’s eStore Experience

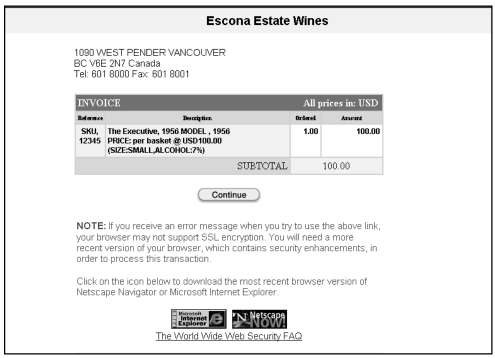
Understanding your customer’s experience is an important part of designing your eStore catalog. The illustration below shows an example of a visit to an eStore catalog using the Escona sample website.



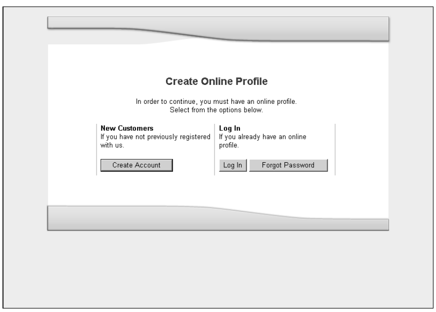
1. The customer arrives at your eStore catalog website using his/her browser.

2. Using the Search page, the customer can search for products by keyword or simply browse the catalog.

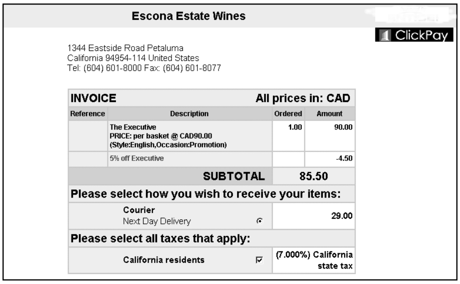
3. In the shopping basket screen, the visitor clicks the “Order Now” button to continue with the order.



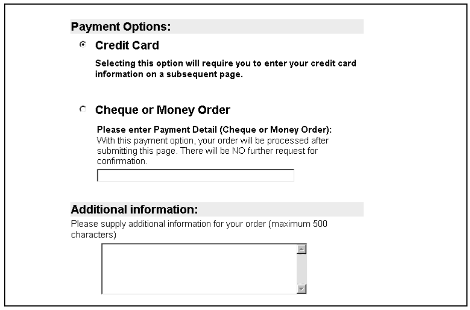
4. The customer is taken to the “order screens” for the catalog. Clicking the Continue button, as illustrated above, ensures credit card information is encrypted.



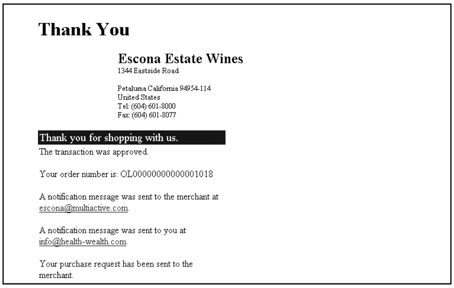
5. The customer is taken to a customer login page. Information such as the customer’s first and last name is captured. This information is automatically sent to Maximizer.



6. The customer is then taken to the order screen.



7. The customer chooses how the order will be paid for. If you set up online transaction processing, eStore collects the credit card information in another screen.



8. After the transaction is complete, a "thank you" page appears. Further details provide the customer with information about order email transactions, and shipping. From this screen, a customer may also return to the online catalog.

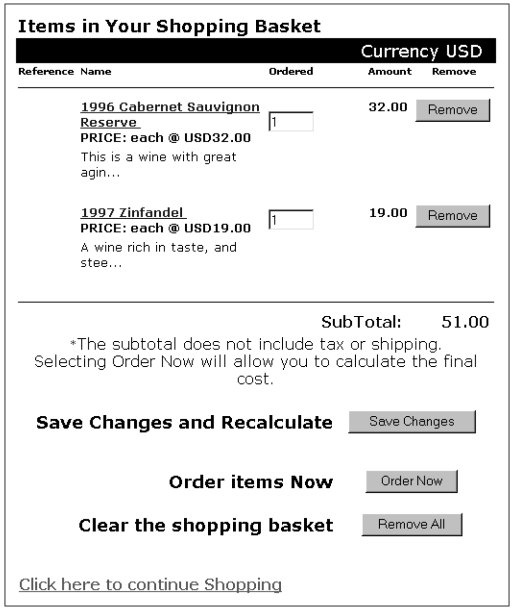
To further confirm the order, eStore sends a confirmation email message to the customer using the email address supplied.

Your Customer's Shopping Basket

Your customer will likely want to browse your catalog first before buying anything. As your customer shops, he or she can add items to a shopping basket. Just like a real shopping basket, the eStore basket

lets customers add items as they shop and, before paying, review the contents of the basket.

The shopping basket lets the customer adjust quantities, remove items, and view subtotals before ordering.



Select the currency in the Payment Method screen. See "Choosing How to Accept Payment" on page 440.

The information shown in the shopping basket includes:

- The type of currency used
- The items, quantities, and options
- The item subtotals
- The basket subtotal

Enhancing Your Catalog with the Catalog Search Page

When a visitor arrives at your site, he or she may already have an idea of what to buy, but your catalog may be large enough to make it hard to find certain items by browsing the catalog sections. You need to include a link to the eStore catalog search page.

From the search page, a visitor can search for items by keyword to bring up a list of possible matches.

Managing Your Online Orders and Inquiries

Use the Maximizer Web Inquiry Form wizard to create an online data collection form. See "Creating Web Inquiry Forms for Your Website" on page 107.

When potential customers visit your ecommerce site, they can complete an online form to either inquire about or order products and services. The data from this form—such as name, address, credit card numbers—is then written to the Maximizer Address Book as an Address Book entry with an attached OrderDesk entry.

If you are using eStore, orders and inquiries automatically arrive in the OrderDesk window from your website.

If you are using ecBuilder, orders and inquiries arrive in your Maximizer Email window as email messages with an MEC file attachment. Select "All eCommerce Messages" from the Email window's View bar. Order/inquiry email messages have the subject line "ecBuilder Inquiry", "ecBuilder Order", or a similar subject. You may wish to save the MEC files in their own folder and double-click the files to import the order/inquiry information.

Order numbers are automatically generated. The prefix indicates the source of the order—MA indicates a manually entered order and OL indicates an order from the online catalog.

Double-click an entry to view or change the details. If you do not use an online transaction processing company, you can open the order and manually mark the payment as received.

Use the OrderDesk window to enter a new order, capture a payment for an order, pre-authorize a payment for an order, complete a pre-authorized payment for an order, and refund a payment for orders that come to you by telephone, mail, or other methods.

OrderDesk allows you to track the status of your inquiries and orders, whether your customers have received a response or had their order fulfilled. It lets you mark specific orders or inquiries as urgent, ignore inquiries without deleting them, and track shipping and payment status for your orders.

You can open the order or inquiry in the OrderDesk window and send a summary of the inquiry by email to the associated customer (Address Book entry) with an automatic reply. You also can send a summary of the inquiry to one or more Maximizer users.

Credit Card Transaction Processing

If you are using a third-party transaction processing company, the OrderDesk window acts as a desktop point-of-sale software solution that supports real-time credit card transactions. This includes pre-authorization of credit card information, pre-authorization completion and/or capture of funds, and refunds that generate a credit on the customer's credit card account.

With the use of a transaction processing company, funds from the consumer's credit card can be captured immediately. Once the credit card information has been verified and the purchase has been authorized, the information can be securely forwarded via a confirmation email message to both the consumer and the merchant.

Payment gateway profiles, sometimes referred to as payment gateway guides or merchant account profiles, are used to facilitate online credit-card transaction processing from your website (which you created with ecBuilder or eStore). When you process an order's credit card transaction using the OrderDesk window, you select the appropriate payment gateway profile from the Payment & Totals tab.

To see which transaction processing companies are supported by Maximizer, select the OrderDesk window, click the Add button in the File > Edit Gateway Settings dialog box and view the items in the Company drop-down list. There is one payment gateway profile per transaction processing company.

Profiles also can be set up using ecBuilder and eStore (see the respective documentation).

Before you set up a profile in Maximizer, you must contact the company and set up a merchant account. This can be done using the Acquire Merchant Account button in the File > Edit Gateway Settings > Add dialog box.

Manually Enter Orders or Inquiries

To learn more about OrderDesk, look up "OrderDesk" in the Maximizer Help index. Refer also to "Using OrderDesk" on page 109.

Because you will likely receive orders from other sources besides your Maximizer website, OrderDesk allows you to enter orders manually, allowing you to manage all your orders using the same application. The order entry screen in OrderDesk gathers the same information as the online forms that your customers fill out on your website.

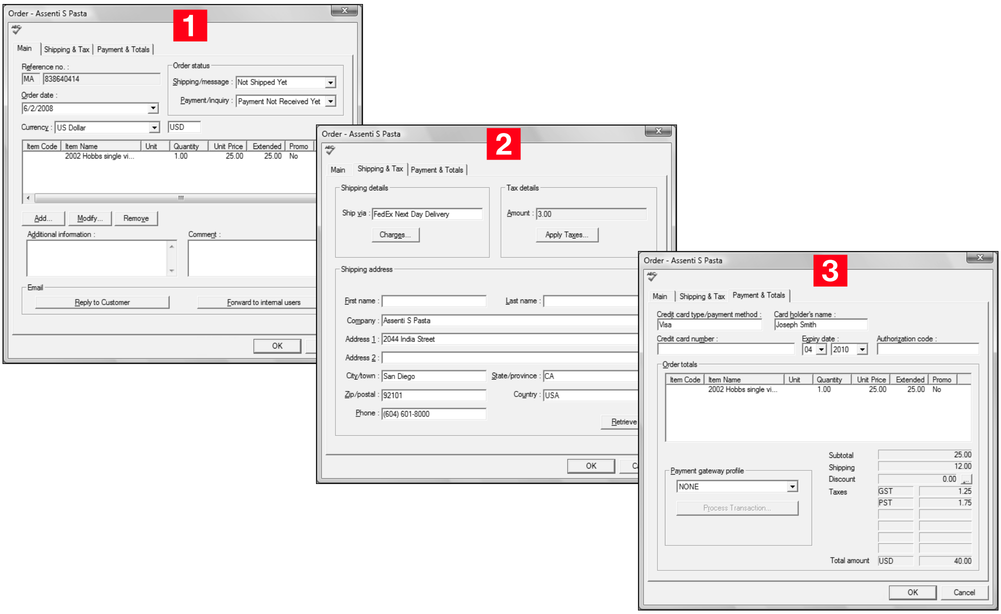
An order or inquiry always must be associated with an Address Book entry, so ensure the appropriate entry is selected before clicking the New button in the OrderDesk or Address Book OrderDesk window. You can also drag an Address Book entry to the OrderDesk icon from the Address Book window. Enter the order or inquiry information, pressing F1 at any time for detailed assistance.

➤ To enter an order

1. Use the **Main** tab to enter the items ordered and set the payment and shipping status.

2. Specify the **shipping method** and **taxes**, and enter the **shipping address**.

3. Use the **Payment & Totals** tab to record the payment information. If you have online transaction processing set up, you can process credit card transactions—payments, authorizations, refunds, and more.



As shown in the previous example, manually entering an order is a simple three-step process. The “Order Status” settings in the Main tab let you manage and track the progress of orders—you can sort your OrderDesk list by either status column to help you find unshipped orders or orders that need attention.

When you manually add an item to an order, you can save yourself time by selecting the item (and its information) from your Maximizer online catalog using the Get Info From Catalog button in the Item dialog box.

Features of the OrderDesk Window

To summarize, the OrderDesk window includes the following capabilities:

- Ability to manage orders or inquiries from your online catalog site
- Manual entry of orders or inquiries received from other sources
- Ability to generate and manage sales quotes, which can later be converted to orders
- Manual preauthorization, authorization, and refunding of payments made against a consumer's credit card
- Tracking of the inquiry, order, shipping, and payment status
- Automatic calculation of taxes and shipping costs
- Automatic email to customers or Maximizer users with summary of order or inquiry
- Filtering of records to display only specific entries or entry type

To learn more about sales quotes, see "Work with Sales Quotes" on page 109.

CHAPTER 13

Using MaxExchange Remote

Working with MaxExchange Remote

In this chapter...

"How MaxExchange Programs Work Together" on page 460

"MaxExchange Administrator's Guide" on page 461

"Glossary of MaxExchange Terms" on page 462

"What Data is Synchronized?" on page 464

"How Do I Receive Updates?" on page 466

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"Receiving the Address Book" on page 467

"Remote Tasks" on page 469

How MaxExchange Programs Work Together

MaxExchange consists of the following applications:

- MaxExchange Synchronization Server
- MaxExchange Server Manager
- MaxExchange Remote Synchronization Server
- MaxExchange Remote
- MaxExchange Site Manager

MaxExchange Synchronization Server

One person is usually in charge of setting up and administering the central Address Book. This MASTER user, or a user with Maximizer Administrator privileges, acts as an administrator for the MaxExchange Server, designates a Maximizer Address Book as the central Address Book—or central Address Books if you are using multiple databases—and schedules updates.

There is only one server for any given Address Book, but one server can have many remotes. These sites are either remote servers or remotes, which can be connected by LAN, WAN, dial-up access, or through the Internet. The central Address Book is maintained on the MaxExchange server, while the remote computers have different replications of the central Address Book.

MaxExchange Server can also be installed as a service on Windows 2000, Windows 2003, and Windows XP. The service runs in the background, as any other Windows service, and typical processing is done automatically. Manual control of processing or any other server tasks are then done through the MaxExchange Server Manager from another machine or on the server.

MaxExchange Remote Synchronization Server

MaxExchange Remote Synchronization Server acts as a middle tier in a multi-tiered synchronization tree. Remotes run MaxExchange Remote Synchronization Server to synchronize their remote changes with those on the site's parent server, which is either the MaxExchange Synchronization Server or a MaxExchange Remote Synchronization Server.

MaxExchange Remote Synchronization Server has the following two basic functions:

- It synchronizes changes from its remotes with the server and receives updates from the server.
- It generates and sends its own updates to its remotes.

MaxExchange Remote Server acts in the capacity of a server and as a remote. It may be installed as an application and service or as a service only.

MaxExchange Server Manager

MaxExchange Server Manager is a utility used to access the server from another computer. When you install MaxExchange Server as a service, this utility is used to perform manual tasks on the server.

MaxExchange Remote

MaxExchange Remote users synchronize the entire image or a subset image of the central Address Book on their remote computers. Remote users also update the central Address Book with changes made on the remotes.

MaxExchange Site Manager

To determine which portions of the central Address Book go to each remote, using MaxExchange Site Manager, the MASTER user, or a user with Maximizer Administrator privileges, defines remotes/ remote servers and the distribution groups to which the remote sites belong. Other important functions of Site Manager are to perform Address Book maintenance on remotes, send refreshes to remotes, set up event notifications, and generate reports. Site Manager is also used to set up teams for campaign and opportunity synchronization.

MaxExchange Administrator’s Guide

For information on using MaxExchange Synchronization Server, MaxExchange Synchronization Remote Server, MaxExchange Server Manager, and MaxExchange Site Manager, refer to the *MaxExchange Administrator’s Guide*. This chapter is to be used by remote users, who, typically, would not be the administrators of MaxExchange.

Glossary of MaxExchange Terms

Use this list of terms to help familiarize yourself with the terminology of MaxExchange.

Central Address Book – A Maximizer Address Book that you specify for the MaxExchange server to synchronize with its distribution sites. The server maintains the central, master image of this Address Book (often at the head office of a company), while the remote computers maintain either partial or complete images of the same Address Book on the distribution sites. Note that you can synchronize more than one central Address Book at a time and multiple Address Books can be hosted on one server.

Although different images of the Address Book are kept on separate computers, together, the server and its remotes effectively work on a single central Address Book, which is periodically updated by the MaxExchange synchronization process.

Distribution Group – A Distribution Group comprises several distribution sites that maintain a particular image of the central Address Book. The MASTER user of the central Address Book, or a user with Maximizer Administrator privileges, uses the MaxExchange Site Manager program to determine which distribution sites belong to each distribution group.

For more information on configuring Maximizer to work with MaxExchange, see the MaxExchange Administrator's Guide.

The MaxExchange Distribution user-defined field, which you create in Administrator, determines which companies and individuals in your central Address Book are distributed to the various remotes. The field is created in Administrator's System Options preferences by clicking the associated button. This field then appears within your User-Defined Fields list and you add values for your distribution groups as necessary.

Distribution Site (Remote or Remote Server) – A computer where MaxExchange Remote is installed. See the Remote glossary definition.

DRB Table – A file table that is used by MaxExchange to track the distribution list of Address Book entries and opportunities for each distribution site. This list is created based on the Distribution Group value associated with an Address Book entry for the MaxExchange Distribution field.

Remote – A computer where a MaxExchange Remote is installed, and on which a partial or complete image of the central Address Book is stored. Remotes are set up and maintained by the MASTER user, or a user with Maximizer Administrator privileges, using the MaxExchange Site Manager program.

Typically, several distribution sites belong to a distribution group. These distribution groups are associated with Address Book entries. You assign default distribution groups to Address Book entries based

on the creator of the entry; each user can be assigned a set of distribution groups and when the user creates an entry, the default distribution groups are automatically assigned. User setup for distribution groups is done in the Access Rights tab of user properties in Administrator or Maximizer (File > Users).

MASTER User – The MASTER user is the owner or the administrator of a Maximizer Address Book. For MaxExchange, the MASTER user administers the central Address Book from the server. The MASTER user grants users access to the Address Book and, if required, restricts their ability to view, add, or delete data or to perform certain functions. The MASTER user is also the only user authorized to use the MaxExchange Site Manager application to set up remotes and distribution groups or use MaxExchange Server Manager. Note that you can have users with Maximizer Administrator privileges equivalent to the MASTER user.

Transaction Journaling – Transaction Journaling is the process by which Maximizer maintains a record of changes made by users to an Address Book.

Transaction Journaling is enabled in Administrator in the System Options preferences. This functionality should not be enabled until you are ready to process data so that unnecessary transactions do not occur.

User-defined field – User-defined fields (UDFs) are customizable fields in Maximizer that you can use to categorize the Address Book entries and opportunities in your Address Books. You can use UDFs to group Companies, Individuals, Contacts, and opportunities in many different ways such as by occupation, hobby, income level, revenue, or any other criteria you want to use.

What Data is Synchronized?

MaxExchange synchronizes all data in an Address Book with the exception of the following:

- Automated campaigns (Traditional campaigns are synchronized)
- Email templates for Automated Campaigns
- Journals
- Expenses
- Graphs
- Search catalogues
- Import catalogues
- Linked documents
- Printer settings
- Window layouts
- Email settings
- Fax settings
- Windows authentication settings
- External third-party tables (non-Maximizer)
- Dashboard settings
- Customer service notification templates
- Holiday Editor information

Synchronize Third-Party Data

There are two custom tables available through the use of the Maximizer Customization Suite (listed below) that allow you to integrate third-party data. The data contained in these tables is synchronized by MaxExchange as follows:

For both the Custom_Independent and Custom_Child tables, the Custom_ID and Custom_Number fields (whether generated automatically or manually entered) on the server and each remote must be unique in a MaxExchange environment. This is to prevent duplicate ID issues from occurring.

- **Custom_Independent** is a top-level data storage table, similar to the Clients table. It is created at database-creation time and contains a number of pre-defined columns. It is always synchronized by MaxExchange, and it synchronizes associated notes, documents, and user-defined fields.
- **Custom_Child** is a mid-level data storage table and is a child of a Custom_Independent record, an Address Book entry, an Opportunity, etc. It is created at database-creation time and contains a number of pre-defined columns, including Client_Id/Client_Number of the parent record. It is always synchronized by MaxExchange, except on a refresh, in which case child records are synchronized only when the parent record is synchronized. It

also synchronizes associated notes, documents, and user-defined fields when the parent record is synchronized.

For more information on using custom third-party tables, refer to the Customization Suite documentation.

Synchronize Opportunities and Campaigns

Address Book entries with opportunities assigned to sales team members are synchronized to remotes, even when corresponding companies are not normally synchronized to those particular remotes (i.e., the Address Book entries are not assigned to the corresponding distribution group). Synchronization of Address Book entries also occurs when a competitor or partner of an opportunity is assigned to a Address Book entry other than the Address Book entry with which the opportunity is associated.

When a Contact is assigned to an opportunity (on the Basic Information tab of an opportunity), the Contact is not synchronized unless the Contact's Company or Individual entry is assigned to a distribution group.

Single-user opportunities are synchronized with only the remotes that created the opportunities. For example, if Remote A creates a single-user opportunity, it is synchronized with only Remote A. The opportunity will not be synchronized with Remote B. Single-user opportunities created on the server are not synchronized.

This works the same way for Traditional campaigns in that Traditional campaigns associated with a member of a marketing team, are also synchronized. Automated campaigns are not synchronized to any distribution sites.

Microsoft Outlook Synchronization and MaxExchange Synchronization

In a MaxExchange environment with Microsoft Outlook Synchronization enabled, Maximizer can synchronize with Outlook on a single server or remote only. Otherwise, duplication of entries may occur.

When MaxExchange is installed, and at least one MaxExchange remote has been added as a distribution site, a MaxExchange Location button appears at the bottom of the Outlook Synchronization tab. Clicking this button opens a dialog box containing a drop-down list of MaxExchange servers and remotes for the current Address Book. Select the MaxExchange server or remote where Maximizer will synchronize entries with an Outlook profile for the selected user.

How Do I Receive Updates?

If your computer is set up for email transport, check to see that your email application is running. Then start MaxExchange Remote.

When you communicate with the server for the first time, the server (or a remote server) sends your computer a data packet with an image of all or part of the central Address Book. (Some entries in the central Address Book may not apply to you, so the MASTER user may exclude them from your Address Book image.) From then on, you receive updates to the central Address Book periodically.

You run MaxExchange Remote to synchronize your distribution site changes with those on the server. The same information is then stored on both the server and remote computers, so that all files are part of the same, single central Address Book. Although the exact process depends on the chosen transport method, here is an example of how the synchronization process works:

- The server assembles Address Book updates in packets, and sends them to your computer, and those of other users at other distribution sites. On your computer, MaxExchange Remote then picks up this data, transfers it to a temporary inbox, and later updates or replaces the data in your central Address Book.
- On your computer, MaxExchange Remote assembles Address Book updates in packets, and sends them to the server. MaxExchange server then picks up the data packets, transfers them to a temporary inbox, and updates the server central Address Book files.

Occasionally, you may receive a message from the MASTER user informing you that he or she is sending you a refresh (a fresh replacement image of your MaxExchange data). When the refresh arrives and is processed, MaxExchange Remote deletes and completely replaces the image of the central Address Book currently on your computer with the new, refreshed version from the server.

You can set MaxExchange Remote to check for updates on a regular schedule. Or, if you prefer, you can request an immediate update at any time. See "Perform an Immediate Update" on page 476 for instructions.

Starting MaxExchange Remote

➤ To start MaxExchange Remote

- Select **MaxExchange Remote** from the Maximizer CRM program menu. Or, double-click the **MaxExchange Remote icon** on the desktop.

Receiving the Address Book

When your system administrator instructs you to do so, start MaxExchange Remote. You will receive an image of the central Address Book and be prompted to save it in a folder of your choice.

If you plan to employ FTP transport, you must first initiate a MaxExchange FTP communication session with the server and pick up the data packet before you can later process it.

If you are a dial-up email user, be sure to set up MaxExchange Remote for a dial-up connection. For more information, see “Set Scheduling Options for Dial-up Email” on page 471.

If you use email or Network Direct transport, you will receive an image of the central Address Book in the “MaxExchange\Inbox\<hexadecimal>” folder on your distribution site computer assuming you have successful data transport from the server. Note that when you receive an image by email the information arrives in the inbox and is moved to the Hexadecimal folder after processing begins.

Please pay special attention to the instructions particular to the transport method your computer will employ with the MaxExchange server. If you are unsure about the transport method you will use, contact your system administrator before proceeding.

➤ To receive the central Address Book

1. Ensure that you have received your first data packet from the server on your computer. Your system administrator will inform you of when an initial data packet has been created and when the packet will be transported to your computer.
   - **FTP** – You must first pick up the data packet from the server. See the instructions below on how to initiate your first MaxExchange FTP transport session.
   - **Network Direct** – In your “MaxExchange\Inbox \<hexadecimal>” folder, look for two files—one with the

extension ATT and the other with the extension HDR. If they exist, you have received a MaxExchange data packet.

- **Email** – If you see an email message entitled "MaxExchange Data Packet" in your email inbox, you have received a MaxExchange data packet.

The "hexadecimal" folder is actually a folder named with a hexadecimal number that corresponds to the Address Folder ID. This ID is displayed in the Distribution List dialog box in MaxExchange Site Manager.

2. Start **MaxExchange Remote**.

3. Depending on the transport method you plan to employ, the methods for initiating the connection with the server vary as follows:

   - **FTP** – You must start by initiating a communication session with the MaxExchange server. Select **File > Connect New FTP Server**. Enter the server IP address (or the server name), port number, Password (the MAXEXCHANGE password entered at the server), and Address Book ID for this distribution site. Click **OK** when finished.

   - **HTTP** – You must start by initiating a communication session with the MaxExchange server. Select **File > Connect New HTTP Server**. Enter the server URL, password, and Address Book ID for this distribution site. Click **OK** when you are finished.

     MaxExchange should immediately initiate an FTP/HTTP session with the server.

   - **Email or Network Direct** – Click the **Process Data Packets** button.

   A dialog will appear asking for the Address Book you want to designate as your synchronized MaxExchange folder. You may select an existing folder from the drop-down list or create a new folder.

If you create a new Address Book, you must specify a name that is different from the name of the Address Book on the server.

4. After the Address Book has been established, MaxExchange Remote will inform you that a refresh packet is ready to process. Click **Yes**. The processing status is displayed in the MaxExchange window.

5. When packet processing has ended, open the synchronized Address Book in Maximizer. Examine your data to ensure that it is correct and complete.

Remote Tasks

This section outlines the tasks you will perform using MaxExchange Remote.

Initiate the First FTP Transport Session

MaxExchange FTP transport can be initiated only by the distribution site computer—not the server. Accordingly, a new distribution site needs to enter information into MaxExchange Remote for this transport to start.

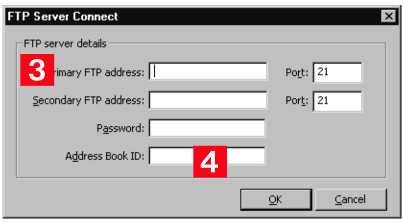
➤ To initiate the first MaxExchange transport session with the server

1. You must receive the following information from your system administrator—the server's IP Address and/or server name, the FTP port number, the MaxExchange FTP password, and your unique Address Book ID (hexadecimal number).

2. Select **File > Connect New FTP Server**.

3. Enter the **server's IP** address or server name, the **MaxExchange FTP password**, and your unique **Address Book ID**.

4. Click **OK**. MaxExchange Remote will immediately open an FTP session with MaxExchange server. If the communication is successful and the first data packet(s) is downloaded to your computer, log into your Address Book.



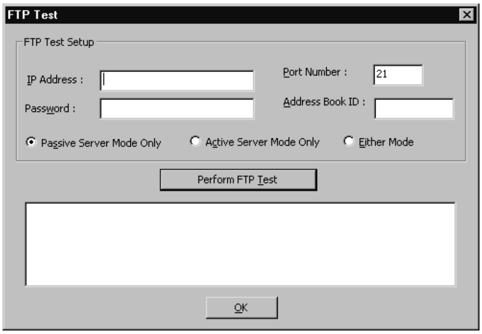
5. Select **File > Process Data Packets**.

After your initial data packet has been processed successfully, the File > Connect New FTP Server dialog is no longer needed for FTP communication to this particular synchronized Address Book. After the initial successful FTP communication session, you need only to select Process Data Packets to start the synchronization process. All future FTP communications will be handled automatically.

FTP Test Option

See the F1 Help for detailed information on each of these fields.

If the connection fails, try using the FTP Test functionality. This is a method to test the FTP connection providing detailed information of why a connection fails, if necessary.



Retry an Unsuccessful FTP Connection

If you attempt an initial FTP communications session and receive notification from the program of FTP communication failure, select File > Retry FTP Server Connect to re-enter your FTP settings and re-establish an FTP session with the server.

➤ To retry a failed FTP communication session with the server

1. Select **File > Retry FTP Server Connect**.
2. Verify that you have entered the correct server's IP Address and/or server name, FTP port number, the MaxExchange FTP password, and your unique Address Book ID.
3. Click **OK**.
4. MaxExchange Remote immediately opens an FTP session with MaxExchange server. If the communication is successful and the first data packet(s) is downloaded to your computer, log into your Address Book.
5. Select **File > Process Data Packets**.

   After your initial data packet has been processed successfully, the File > Retry FTP Server Connect dialog is no longer needed for FTP communication to this particular synchronized Address Book. After the initial successful FTP communication, you need only to select Process Data Packets to start the synchronization process. All future FTP communications will be handled automatically.

Start a Processing Session from Maximizer

You can start a processing session from Maximizer with a simple click of a button.

➤ To start a processing session from Maximizer

1. In Maximizer, click the **Process MaxExchange Data Packets** button. Alternatively, you can choose **Tools > Process MaxExchange Data Packets**.

   An icon appears in your system tray for MaxExchange Remote. The icon appears differently depending on the state of processing. Following are the various states of the processing icon:

    Processing

    Processing Finished

    Failed

   While processing is taking place, you can click on the **Processing** icon to open MaxExchange Remote and view the processing details.

   When the processing session is taking place, the tooltip for MaxExchange Remote says “Processing”. After the processing session is complete, the tooltip says “Processing Finished”. If the connection to the Address Book or FTP server failed, the tooltip says “Failed”. Otherwise, the tooltip says “MaxExchange Remote”.

2. After the processing session, you can close or open MaxExchange Remote by right-clicking on the system tray icon and choosing **Exit** or **Restore**.

Set Scheduling Options for Dial-up Email

If you are using dial-up email to exchange updates with the MaxExchange server, you can set a schedule for processing and sending the updates.

You can set up MaxExchange Remote and your email connection to automate the process of dialing into the email system and sending and receiving central Address Book updates. When you set up an automatic dial-up schedule, you do not need to see MaxExchange Remote again until you want to change its settings. You simply set your email application to automatically connect using the same schedule you set for MaxExchange Remote. For more information

about scheduling email connections, see the documentation for your email program.

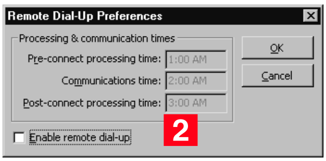
Remote dial-up scheduling can be used only when the following conditions are present:

- Email is the Active Transport Method for your MaxExchange data transport.
- The third-party email program you employ has its remote email client/driver set.

When dial-up email is not installed, the Edit > Remote Dial-Up Preferences dialog is unavailable.

➤ To set remote dial-up scheduling options

1. Select **Edit > Remote Dial-Up Preferences**.
2. In the Remote Dial-Up Preferences dialog box, select the **Enable Remote Dial-Up** checkbox.



3. In the Pre-Connect Processing Time field, type the time at which you want to create outgoing data packets for later transmission to the server.
4. In the Communications Time field, type the time at which you want the update data packets placed in your email outbox.

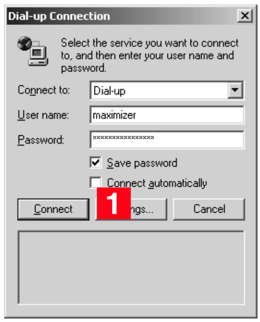
   You must configure your email program to connect and send and receive mail separately. You should set it to do so sometime later than the Communications Time.
5. In the Post-connect Processing Time field, type the time at which you want MaxExchange Remote to process incoming data packets from the server to update your image of the central Address Book.
6. Click **OK**.

Connect by Dial-up Using FTP

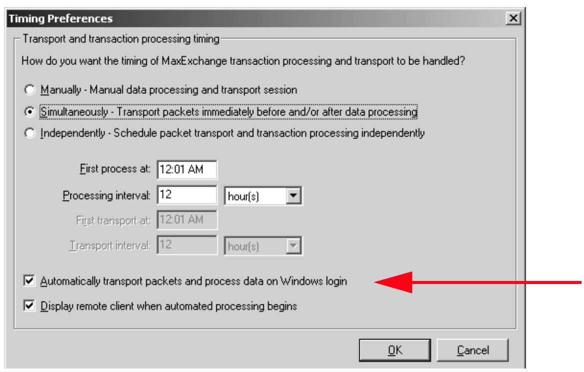
When you are using FTP, the connection between the server and remote is always initiated from the remote computer. This can be done through a LAN or a dial-up connection. If a remote is set up for dial-up connections and a connection fails, a Windows Dial-up Connection dialog box appears when a processing session is initiated. This includes when a processing session is automated.

➤ To connect by dial-up using FTP

1. Click the **Connect** button. You can enable the **Connect automatically** option if you want to dial in to your Internet service provider when you start a processing session.

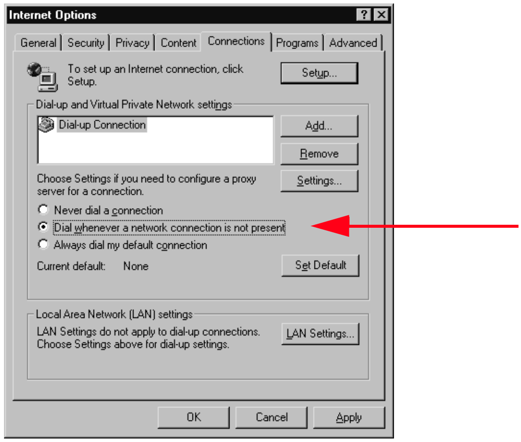


If you have set up your remote computer to process upon startup, the Windows Dial-up Connection dialog box automatically appears when you log on to Windows. Otherwise, when you click the Process Data Packets on the remote computer, the Dial-up Connection dialog box appears.



Note that in your Internet Options, the **Dial whenever a network connection is not present** option on the

Connections tab must be set in order for the Windows Dial-up Connection dialog box to appear.



Set Timing Preferences

Timing Preferences in the Edit menu schedules updates for all transport except dial-up email. This includes FTP, Network Direct transport, and LAN email. You can set how frequently MaxExchange Remote processes data packets. At the interval you specify, MaxExchange Remote will transport its updates to the MaxExchange server.

Your computer must be on, and MaxExchange and the email system must be operating for MaxExchange synchronization to occur successfully. Your computer must have MaxExchange Remote running, all necessary transport resources must be enabled (e.g., modem turned on), and required transport access to the server must be available.

➤ To set timing preferences

1. Select **Edit > Timing Preferences**.

   In the Timing Preferences dialog box, specify your processing and transport times. The behavior of each option depends on the Transport Method used.

2. Choose **Manually** (transports packets immediately after the initiation of a processing session), **Simultaneously** (transports immediately after processing), or **Independently** (process and transport at different times).

3. Transaction Processing Settings allow you to set processing to be activated automatically at a specific time.

If no First Process time or Processing Interval is set, data packet processing will occur only when you do immediate processing using the File > Process Data Packets command.

If you want to schedule a data processing time, enter the fields as follows:

- In the **First Process At** field, type the **time** at which processing is to start for the first time after these settings are changed. Specify the time in 12-hour format; for example, 7:00 PM.
- In the **Processing Interval** field, type the **frequency** and select the units for how often processing should occur; for example, every 15 minutes. You can select intervals as short as every 1 minute or as long as every 24 hours.

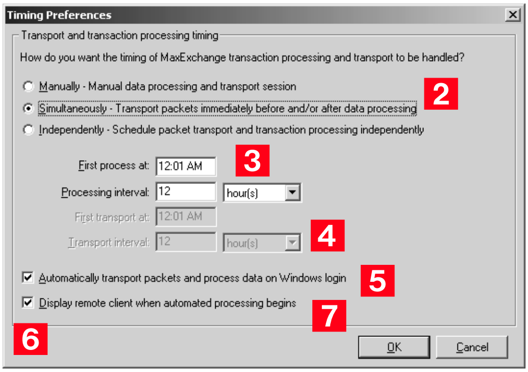
4 Transport Time Settings are available only when Independently is chosen above. These settings allow you to transport packets at times independent of when you process data packets.

- In the **First Transport At** field, type the time at which transport is to start for the first time after these settings are changed. Specify the time in 12-hour format; for example, 7:00 PM.
- In the **Transport Interval** field, type the frequency and select the units for how often transport should occur; for example, every 15 minutes. You can select intervals as short as every 1 minute or as long as every 24 hours.

5 Select the **Automatically transport packets and process data on Windows login** option to automatically start processing when you log into Windows.

6 Disable the **Display remote client when automated processing begins** option if you do not want the MaxExchange Packet Transport dialog box to appear during an automated processing session. The MaxExchange Remote processing icon will still appear in the Windows system tray.

7 Click **OK**.



You must exit and restart MaxExchange Remote for your changes to take effect.

Perform an Immediate Update

When required, you can perform an immediate update of the central Address Book. MaxExchange Remote checks for incoming changes from the MaxExchange server, then makes these changes to the central Address Book.

After the incoming changes have been processed, MaxExchange Remote prepares and sends data packets to the server for redistribution to its other distribution sites. Once the overall synchronization is complete, the whole central Address Book (both on the server and at the distribution sites) is up to date.

If you are using email as a transport method, your computer must be running and the email system must be operating for MaxExchange to perform an immediate update.

Your computer must have MaxExchange Remote running, all necessary transport resources must be enabled (e.g., modem turned on), and required transport access to the server must be available.

➤ To perform an immediate update

- Click the **Process Data Packets** button or select **File > Process Data Packets**.

  MaxExchange Remote updates the central Address Book by first checking for updates from the server and processing them, then preparing and distributing your local changes back to the server for redistribution. (If you enable Remote Dial-up, the order of these processes may be reversed. See "Set Scheduling Options for Dial-up Email" on page 471 for more information.)

Regardless of which transport method is used, Process Data Packets simply creates a data packet and puts it into a folder for transport to the server.

The "hexadecimal" folder is actually a folder named with a hexadecimal number that corresponds to the Address Folder ID. This ID is displayed in the Distribution List dialog box in MaxExchange Site Manager.

- **FTP** – The data packet files—.ATT and .HDR—are created and put into the \maxexchange\outbox\<hexadecimal> folder. The distribution site computer will later initiate an FTP transport session and pick up the packet.
- **Network Direct** – A new data packet is created (.HDR and .ATT files) and put into a folder for transport. When the data packet is in the folder, the packet is transported immediately if you have selected Simultaneous in the Processing and Transport Times dialog box.
- **Email** – The data packet is sent immediately to your local email outbox, encapsulated in an email message, and transported during your next email session.

Change Email Preferences

To optimize MaxExchange Remote operations when using email data transport, you may specify the email system you plan to use in the Email Preferences dialog box.

When you select your email system in the Email Preferences dialog box, MaxExchange accounts for the differences in the third party email software to ensure proper transport operation.

Email preferences should not have to be changed except under the following circumstances:

- You are installing MaxExchange Remote and your chosen transport method is email.
- You are changing your email application software.
- Your transport method is changed to email.

➤ To set email preferences

1. Select **Edit > Email Preferences**.
2. Select the **email system** that applies to your computer.
3. Specify the **maximum size** of any single packet in kilobytes (KB). This applies to the outgoing packet size on the remote. Email packets are then limited to this size. If a packet is larger than this limit, the packet is spanned into smaller packets within the limit. If the limit is set to 0, the packet size is unlimited.
4. Indicate whether to convert packets so they can be sent over the Internet in its standard, **7-bit** email format. If you send packets

over the Internet, you must select this option to ensure that they are reliably transmitted.

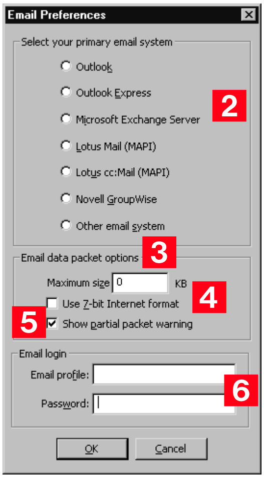
5. Enable the **partial packet warning** if necessary.

   When the size of a packet exceeds the maximum size set for a packet (if enabled in Maximum Size above), partial packets are created. The sum of these partial packets makes up the entire data packet. For instance, take an example where a system administrator sets the limit on packets to 2 MB (or 2000 KB). Assume that the Server creates a large data packet that is 3.5 MB or 3500 KB. MaxExchange will break this packet into 2 partial packets. If only one of these data packets arrives, but the other is still in transit, the data from the first partial data packet cannot be processed until the second partial data packet is received as well.

Email account information is set up after your email application is installed. If you are using Microsoft Outlook, you can access this information through the Windows Control Panel. See your system administrator for more information.

6. Enter your email account **Email profile/User name** and **password** (if required). The available options vary depending on what type of email application you are using.

7. Click **OK**.



Change Your MaxExchange FTP Password

When the MAXEXCHANGE user profile Password changes, all distribution sites need to receive this information so that they can access the MaxExchange FTP server.

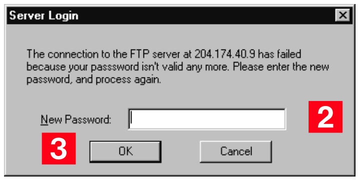
The MAXEXCHANGE Password can be changed only at the server using the MaxExchange Site Manager. When the Password is changed, and the change is processed by the server, the change is contained in a data packet for each distribution site to pick up.

➤ Changing your MaxExchange FTP password

1. Click **Process Data Packets**. The data packet containing the Password change is downloaded to your computer.

   If your computer is set to use FTP transport, and the server FTP password has been changed, you will receive the Server Login dialog:

2. Enter the password given to you by your system administrator.
3. Click **OK**.



To process any additional packets retrieved after the Password change, click Process Data Packets once again.

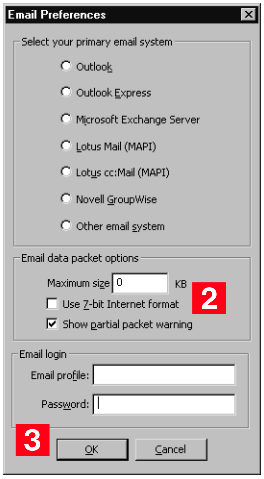
Convert Outgoing Packets for Internet Transport

Internet email uses a different encoding standard than many LAN email packages. Therefore, if you send data packets over the Internet to the MaxExchange server, the packets must be converted to 7-bit Internet format.

➤ To convert packets for Internet transport

1. Select **Edit > Email Preferences**.
2. Select **Use 7-bit Internet Format**.

3 Click **OK**.



All subsequent data packet files are converted to 7-bit Internet format before being sent to the server.

Restrict the Size of Packets

Depending on the potential size of the updates or the file size limits specified in your email system, you may need to limit the size of your MaxExchange data packets to prevent data from being lost.

➤ To limit the size of packet files

1 Select **Edit > Email Preferences**.

2 In the **Maximum Size** field, specify the maximum size of the file in kilobytes (KB). (If you do not know your file size limit, consult your network administrator or email documentation.)

For no limit on data packet size, leave the field blank.

3 Click **OK**.

MaxExchange Remote ensures that no subsequent data packets are larger than the size you specified.

Disable the Partial Packet Warning Message

If you set a maximum packet size above, packets created by MaxExchange that are larger must be split into multiple packets that do not exceed the maximum size. Until all such partial packets are received, the distribution site cannot process any of the complete packets' parts. When MaxExchange Remote cannot process because

all of the partial packets are not received, it displays a Partial Packet Warning dialog.

The Show Partial Packet warning dialog is enabled on installation. When this warning dialog is enabled, you must respond to the dialog before other packet processing can continue. If the warning dialog is disabled, packet processing can continue without your response, but partial packet occurrence may go unnoticed.

➤ To disable the Partial Packet Warning dialog

1. Select **Edit > Email Preferences**.
2. Deselect (disable) the **Show Partial Packet Warning** checkbox.
3. Click **OK**.

Save Outgoing Packets to Disk

When necessary, you can save outgoing data packets to disk such as floppy diskettes or other removable media, so the packets can later be imported by the MASTER user into the MaxExchange server.

➤ To save a packet to disk

- Select **File > Save to Disk**.

  The Save to Disk menu item in the File menu should now have a check mark next to it.

All subsequent data packets are saved to disk instead of being transmitted by email. Once the data packets have been saved to disk, you must send the disks to the MASTER user at the server location.

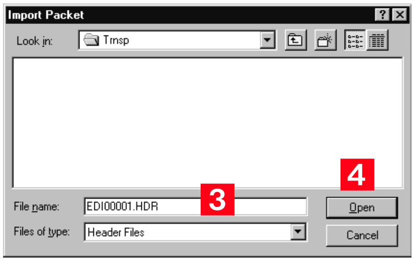
Import a Server Packet

There may be times when you receive data packets from the MaxExchange server that were saved to disk or a hard drive directory (folder).

➤ To import a server packet

1. Insert the appropriate disk containing the server data packet in your disk drive.
2. Select **File > Import Packet**.
3. Specify the location and file name of the server data packet.

4. Click **Open**.



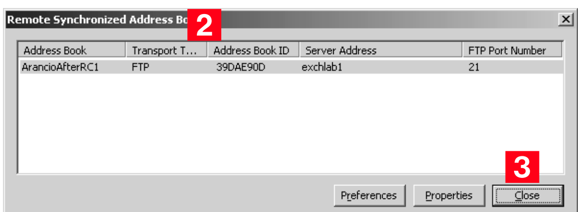
The data packet is copied to a processing queue and will be applied to the central Address Book during the next processing of data packets.

View Synchronized Address Book Properties

You may view certain transport information for every synchronized Address Book on a distribution site computer. MaxExchange reads transport information contained in the MXZREM.BIN file in the "MaxExchange" program directory.

➤ To view synchronized Address Books on a remote computer.

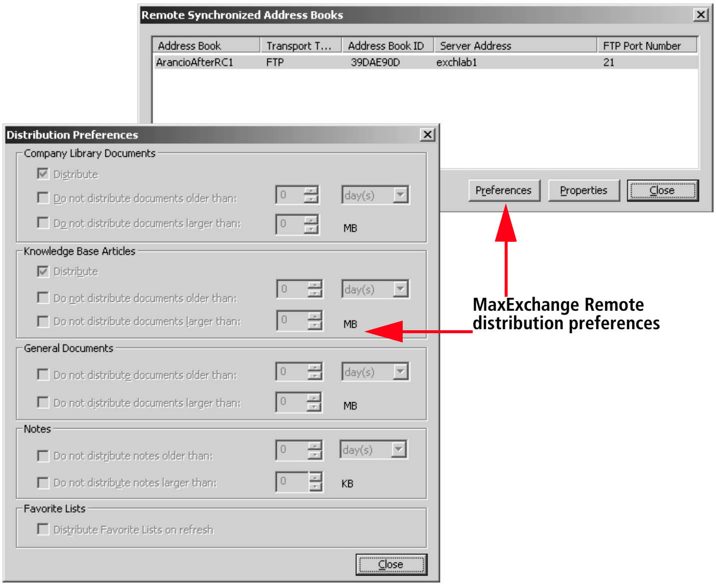
1. Select **View > Synchronized Address Books**.
2. The **Address Book name**, its **transport method**, **Address Book ID**, **server address**, and **server port number** are shown. You can change the server address and port number if necessary.
3. When finished viewing, click **Close** to exit the dialog.



View Distribution Preferences

➤ To view distribution properties

- The distribution preferences can be viewed in MaxExchange Remote by clicking the **Preferences** button while viewing the synchronized Address Book properties (**View > Synchronized Address Books**).

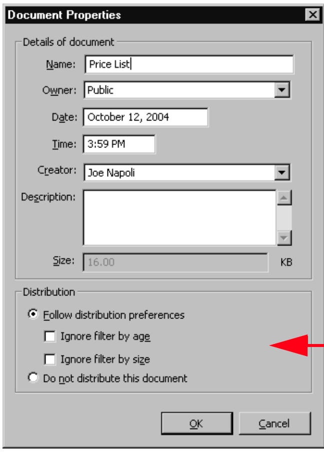


➤ To view distribution properties in Maximizer

Note that these Distribution attributes (other than the default preferences option) override the preferences set in MaxExchange Site Manager.

- Distribution preferences appear as part of the properties for Company Library documents, knowledge base articles, general documents, and notes (right-click on one of these items and

choose **Properties**). Only the MASTER user has rights to change these preferences in the Properties dialog box (in Maximizer).



Distribution preferences for a general document

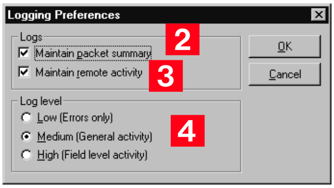
Set Up the Troubleshooting Logs

You can log MaxExchange Remote activity in troubleshooting logs. MaxExchange Remote creates two logs (a Packet Summary Log, Packlog.txt, and a Remote Activity log, Rmdmlog.txt), both of which are text files located in the same directory (folder) as your MaxExchange programs.

➤ To create logs

1. Select **Edit > Logging Preferences**.
2. To log when data packets are received by your computer, select **Maintain Packet Summary**. Log information is saved in the text file Packlog.txt.
3. To log detailed information about when data packets are sent and received, and what happens to them, select **Maintain Remote Activity**. Log information is saved in the file Rmdmlog.txt.
4. Indicate the **level of log detail** you want to see in the Rmdmlog.txt:
   - To log errors only, select Low.
   - To log record-level updates (additions, changes, and deletions of Maximizer entries), select Medium.
   - To log field-level updates (details of changes within Maximizer entries), select High.

5 Click **OK**.



Check the Troubleshooting Logs

If you employ email transport, you may also check your email system's conversation log for more information.

If you have set the troubleshooting logs to record MaxExchange activity, you can check the logs when you experience problems during a synchronization session or suspect that updates are not being sent or received.

Remote Activity Log (Rmdmlog.txt)

Check the Rmdmlog.txt by selecting View > Remote Activity Log. The Rmdmlog.txt file can include:

- The number of information packets sent.
- The number of information packets received.
- The number of additions, updates, and deletions made to your image of the central Address Book.

The contents of the log depend on the detail level you set when configuring MaxExchange Remote's log file.

Packet Summary Log (Packlog.txt)

For information about the date and time information packets were received, check the Packlog.txt by selecting View > Packet Summary Log.

Change Email from LAN to Dial-Up or Vice Versa

To change a distribution site computer from a LAN remote to dial-up remote, or vice versa, you must make changes to both the MaxExchange Remote settings and your current mail driver on the distribution site computer.

➤ To change a LAN email remote to a dial-up email remote:

1. Select **Edit > Remote Dial-Up Preferences**. Set all time fields in the Process and Transport Timing group box and select the Enable Remote Dial-Up checkbox.
2. Change your current mail driver from Network to **Remote**. Contact your system administrator for additional details.
3. Ensure that the automatic dial-up time of your email communications program corresponds to the processing and communication times set above.

CHAPTER 14

Administration for Maximizer

Administration for Maximizer

In this chapter...

"Enabling TAPI with Maximizer" on page 488

"Phone Masks" on page 493

"Maximizer Field Types" on page 494

"Updating Maximizer with the Live Update Wizard" on page 496

"Backing Up and Restoring Address Book Data" on page 498

"Changing Languages for the Maximizer Spell Checker" on page 500

Enabling TAPI with Maximizer

Maximizer can use TAPI (Telephony Application Programming Interface) to detect incoming phone numbers (using caller ID) and log the phone conversation for the matching Address Book entry.

The following requirements must be met to use TAPI with Maximizer:

- Your telephone system must be TAPI-enabled.
- Your phone system's TAPI driver must be installed.
- Your computer's modem must be compatible with TAPI. You can configure your modem for TAPI through the Windows Control Panel (Control Panel > Phone and Modem Options > Advanced tab). For more information, refer to your TAPI system and Windows documentation.
- Maximizer must be configured for TAPI, as described in this section.

Requirements for Caller ID

Specific requirements are essential to implement Caller ID detection:

- Caller ID service from the local telephone company
- TAPI-compliant hardware that is Caller-ID capable
- A TSPI component (such as an .INF file driver) for your Caller-ID enabled TAPI hardware (e.g., UniModemV)
- Microsoft TAPI software components

Even if you meet these requirements, caller ID may not operate properly, especially if your local telephone company uses a different standard for caller ID than your TAPI driver. Call your local phone company to obtain more information regarding your caller ID standard and compare it to the standard used by the TAPI driver.

Reasons Why Caller ID May Not Work

If you use a TAPI-enabled modem (as opposed to a PBX, H.323, or other TAPI hardware), and your telephone company provide MESG-format caller ID information (rather than SDM, another common format), caller ID call detection is unlikely to work.

Microsoft's UniModemV TAPI driver and MODEM.INF file, provided with most TAPI modems, do not support MESG caller ID format, which means your modem (and Maximizer) may never receive caller ID information from TAPI. If your modem manufacturer provides its own TAPI modem or PBX driver and the appropriate INF file, or you are able to obtain SDM-format caller ID, you might have more success.

Phone Number Matching with TAPI

When Maximizer uses TAPI to detect an incoming phone call, it matches the phone call to a Maximizer Address Book entry and logs the call as a note for the entry. Depending on your TAPI configuration in Maximizer, it uses either the “Smart Phone Number Matching” or “Exact Phone Number Matching” algorithm to determine which Address Book entry matches the incoming phone number.

Smart Phone Number Matching

By default, Maximizer uses the Smart Phone Number Matching algorithm to determine which Address Book entry matches the incoming call.

When a call comes in, Smart Phone Number Matching looks for all Address Book entries with phone numbers ending with the incoming phone number string and displays those Address Book entries in a list so you can select the correct entry.

For example, if the incoming phone number string is four digits, Maximizer displays a list of all Address Book entries ending in those four digits.

Smart Phone Number Matching matches the digits from right to left. The number of matched digits required for matching is equal to the shorter length of the two phone numbers.

The following table illustrates Smart Phone Number Matching for four-digit and seven-digit incoming phone numbers.

Address Book entry phone number	**Does the incoming four-digit phone number (2314) match?**	**Does the incoming seven-digit phone number (732-2314) match?**
9-604-732-2314	**Yes**	**Yes**
1-604-732-2314	**Yes**	**Yes**
403-732-2314	**Yes**	**Yes**
732-2314	**Yes**	**Yes**
497-2314	**Yes**	No
2314	**Yes**	**Yes**
3514	No	No
14	**Yes**	**Yes**

Exact Phone Number Matching

If you select the "Enable exact number matching" checkbox in the TAPI preferences in Maximizer, it uses the Exact Phone Number Matching algorithm instead of Smart Phone Number Matching.

Exact Phone Number Matching considers an Address Book entry to match the incoming call only if both numbers contain exactly the same phone number with the specified number of digits.

By default, Exact Number Matching requires both phone numbers to be seven digits, but you can change the required number of digits.

The advantage of Exact Phone Number Matching is that when Maximizer finds an Address Book entry that matches exactly, you do not need to select it from a list of possible matches, as you do with Smart Phone Number Matching.

The following table illustrates Exact Phone Number Matching for four-digit and seven-digit incoming phone numbers.

Address Book entry phone number	**Does the incoming four-digit phone number (2314) match?**	**Does the incoming seven-digit phone number (732-2314) match?**
9-604-732-2314	No	No
1-604-732-2314	No	No
403-732-2314	No	No
732-2314	No	**Yes**
497-2314	No	No
2314	**Yes**	No
3514	No	No
14	No	No

For instructions on enabling and configuring Exact Phone Number Matching, refer to "Configure Maximizer to Use TAPI" on page 491.

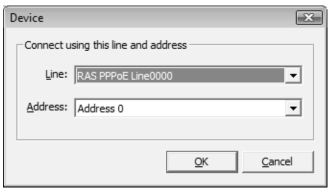
Configure Maximizer to Use TAPI

TAPI can also be configured from Administrator in the Dialing tab of user preferences.

Before you can configure Maximizer to use TAPI, you must have a TAPI-enabled telephone system, and your computer's modem must be configured to use TAPI. You can configure your modem for TAPI through the Windows Control Panel (Control Panel > Phone and Modem Options > Advanced tab). For more information, refer to your TAPI system and Windows documentation.

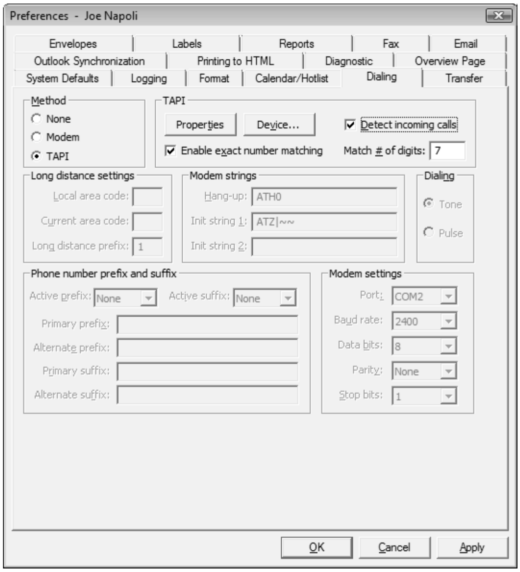
➤ To configure Maximizer to use TAPI

1. In Maximizer, select **File** > **Preferences**.
2. Click the **Dialing** tab.
3. In the **Method** group box, select the **TAPI** option.
4. Click **Properties**.
5. Fill in your location information, and click **OK** twice to return to the Maximizer Dialing Preferences.
6. Click **Device**.
7. Select your TAPI device name from the **Line** drop-down list, and click **OK**.



8. Select the **Detect incoming calls** option.
9. Select the **Enable exact number matching** option, if desired.

10 If you enabled exact number matching, enter the number of phone number digits to match exactly in the **Match # of digits** box, or leave the default setting of 7.



11 Click **OK** to close the Preferences dialog box.

Phone Masks

If the Phone Mask registry key does not exist, you must create it as a String value.

The registry entry (HKEY_CURRENT_USER\Software\Maximizer Software\Maximizer\Modules\AMGR\INTL\Phone Mask) overrides the default format of a phone number with the phone mask provided as a value. The mask uses # to indicate digits and can include any other characters (e.g., + - ,).

The mask formats from right to left. For example, if the phone mask value is ###-####, but a user enters a 10-digit phone number (e.g., 1234567890), the result would be formatted as 123456-7890. If the value has fewer digits than the mask allows, the extra (left-most) placeholders are not used.

Examples

Phone Mask	Digits	Value Typed in	Display
Not specified (default)	7	1234567	123-4567
	10	1234567890	123456-7890
###-####	7	1234567	123-4567
	10	1234567890	123456-7890
(###) ###-####	7	1234567	123-4567
	10	1234567890	(123) 456-7890
+1 (###) ###-####	7	1234567	123-4567
	10	1234567890	+1 (123) 456-7890
### ## ####-######	15	123456789012345	123 45 5678-012345

The Phone Mask value effects the display of phone numbers in Maximizer program dialog boxes and window lists. The Phone Mask value is read during program startup.

Maximizer Field Types

Use Key Fields

Key fields are important user-defined fields that are specific to Address Book entries, opportunities, campaigns, and customer service cases, making them more readily accessible. The user-defined fields that appear as key fields in these tabs is controlled in Administrator. Mandatory user-defined fields can be assigned as key fields, so users don't miss them when creating a new record. Typically, key fields are frequently used user-defined fields, making it easier for users to quickly enter these values. A key field can be defined for a specific user or group, or for all users.

Specify Key Fields by Module

When key fields are set up in Administrator, up to eight user-defined fields can be specified for each module. The modules are described in the following table.

The user-defined fields available for each module correspond to the related type of user-defined field and the related Maximizer module. For example, the Customer Service Key Fields module may contain only customer service user-defined fields, and these key fields will be available only in the customer service case dialog box in Maximizer.

Each type of Address Book module has Lead and Non-Lead versions, which determines the type of Address Book entry the key fields applies to. For example, Individual - Non-Lead key fields appear only in Individual Address Book entries that are not marked as leads.

Key Fields Module	Type of User-Defined Field	Visible in Maximizer Module
Company - Lead	Address Book entry user-defined fields for Companies	Companies that are marked as Leads
Company - Non-Lead	Address Book entry user-defined fields for Companies	Companies that are not marked as Leads
Individual - Lead	Address Book entry user-defined fields for Individuals	Individuals that are marked as Leads
Individual - Non-Lead	Address Book entry user-defined fields for Individuals	Individuals that are not marked as Leads

Key Fields Module	Type of User-Defined Field	Visible in Maximizer Module
Contact - Lead	Address Book entry user-defined fields for Contacts	Contacts that are marked as Leads
Contact - Non-Lead	Address Book entry user-defined fields for Contacts	Contacts that are not marked as Leads
Opportunity	Opportunity user-defined fields	Opportunities
Campaign	Campaign user-defined fields	Campaigns
Customer Service	Customer Service user-defined fields	Customer Service cases

Mandatory Fields

There are two types of mandatory fields in Maximizer as follows:

- Fields in Maximizer entries that must contain a value when creating certain types of entries. For example, these fields can be designated on the Basic Information tab for Address Book entries. These mandatory fields are designated through File > Preferences > Mandatory Fields in Administrator.
- User-defined fields that must contain a value. Mandatory user-defined fields are designated through File > Set Up User-Defined Fields in Administrator or Maximizer.

Mandatory user-defined fields are denoted with an asterisk displayed after the field type.

System Fields

There are two types of system fields in Maximizer as follows:

- User-defined fields created by Maximizer rather than by users. Users can modify some properties of these fields but cannot delete them.
- All Maximizer fields that are not user-defined fields are system fields. A few system fields have customizable value-selection lists, which can be defined through File > Preferences > System Fields in Administrator.

System fields are shown in bold, black text.

Updating Maximizer with the Live Update Wizard

The Maximizer Live Update Service is installed automatically with Maximizer CRM server and workstation. It enables users to download updates such as hot fixes and service releases, and you can configure Live Update to provide automatic notification of available updates.

The Live Update Wizard on Maximizer workstations connects to your Live Update Server and downloads any available updates.

Live Update options in Administrator are accessible through the Live Update button on the System Options tab in File > Preferences.

➤ To start the Live Update Wizard

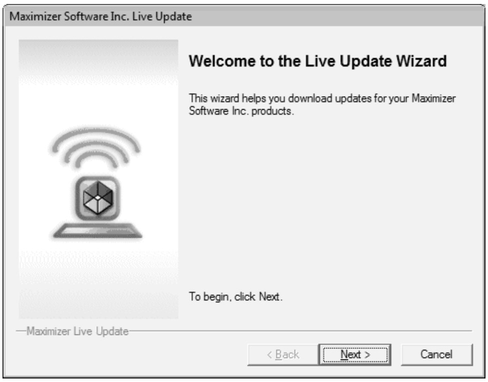
- If the **Enable automatic Maximizer Live Update notification** option is selected in the Live Update options in Administrator, a message box (shown below) notifies you when new updates are available. Click **OK** to start the Live Update Wizard.

  – or –

- In Administrator or Maximizer, select **Help** > **Maximizer Live Update**.

➤ To download software updates from the server

1. Start the **Live Update Wizard** as described above.



2. Click **Next**.

   The Live Update Wizard connects to the Live Update Server to check for any available updates.

The updates download folder path is specified in the Preferences tab of Live Update Manager.

3. Select the update(s) to download.
4. Click **Next** to download the selected updates.
5. Click **Finish** to close the wizard.

The downloaded executable file should launch immediately to start the installation. If you need to locate the downloaded file, it is in the user's Application Data folder (typically C:\Documents and Settings\<CurrentUser>\Application Data\Maximizer\Live Update).

Backing Up and Restoring Address Book Data

You can back up and restore Maximizer Address Book data. Note that if your Address Book uses a custom dictionary or holidays you must back up this data separately from the Address Book. See "Back Up the Dictionary and Holiday Files" on page 500 for more information.

Back Up an Address Book

For information on backing up Address Books in Maximizer CRM Professional Edition and Maximizer CRM Enterprise Edition, see the *Maximizer CRM Administrator's Guide* and your Microsoft SQL Server documentation.

The following two backup procedures are available in Maximizer CRM Group Edition:

- **Regular Backup.** This backup procedure requires the Address Book to be closed and must be done in Administrator. See the *Maximizer CRM Administrator's Guide* and Administrator Help for assistance.
- **Quick Backup.** This backup procedure is performed on an open Address Book. You can perform a Quick Backup from either Administrator or Maximizer. If security is enabled, you will need access to the MASTER user password.

Quick Backup

The advantage of using Quick Backup is that you can perform frequent backups of any open Address Book.

If you are backing up a global Address Book from a workstation, the backup is automatically saved to the default SQL Server Express backup folder. You do not have the option to save the backup to a different location.

By default, the backup is saved to the current Address Book folder. If you don't want to save the backup to this location, you can browse to another one.

If you choose to save the backup to the default location, Quick Backup creates a subfolder named Backup in the same folder as the Address Book files.

The backup file name includes the current date as an identifier. For example, the following backup file was created from a Quick Backup performed on March 23, 2007. (The backup was saved to the following default location).

C:\ProgramData\Maximizer\AddrBks\EsconaTutorial\Backup\EsconaTutorial_20070815_01.BAK

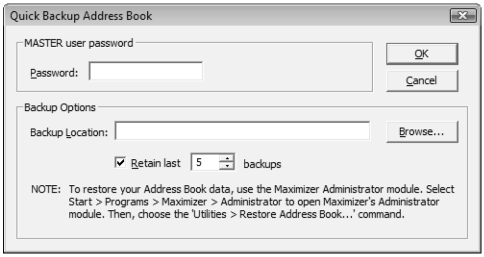
The "_01" is added to the file name to differentiate between backups from the same day, so a second backup on the same day would be saved as follows:

C:\ProgramData\Maximizer\AddrBks\EsconaTutorial\Backup\EsconaTutorial_20070815_02.BAK

Quick Backup also lets you determine how many backups are kept. If you were to set Quick Backup to retain only five backups, then when you create the sixth backup, Quick Backup deletes the oldest backup.

➤ To perform a Quick Backup

1. Open the Address Book to back up.
2. Select **File** > **Quick Backup**.



3. Enter the MASTER user password.

   If this box is disabled, continue to the next step.

4. Select the backup folder:

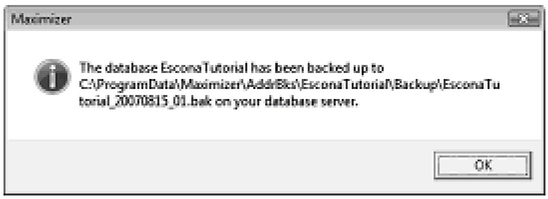
   If you want to save the backup file to the default location (Address Book folder), leave the **Backup Location** field blank.

   If you want to save the backup file to a different location, click **Browse**. Select a folder in the Browse for Folder dialog box and click **OK**. The location is displayed in the Backup Location field.

5. Specify the number of previous backups to retain if you are:
   - Backing up a local database on a workstation.
   - Backing up a global or local database on a server machine.

6. Click **OK** to begin backing up.

   When the Quick Backup is complete, a message box confirms that the backup was successful. The backup file name and location are displayed.



7. Click **OK**.

Restore an Address Book

If you have lost or damaged your Address Book, you can restore it to a previously backed up version. The restore procedure replaces existing Address Book data with backup Address Book data.

If you are restoring data from a network location, you must have access to the folder where the backup file is saved.

See the Administrator's Guide and Administrator Help for further assistance.

Back Up the Dictionary and Holiday Files

Holiday files are created in Holiday Editor—a utility in Administrator you can use to add or edit holidays in the Maximizer calendar. By default, the Holiday Editor contains many North American holidays. The holidays listed in the Holiday Editor also appear in the Calendar window in Maximizer. You can use Administrator to modify or delete existing holidays, or add new holidays.

The Maximizer dictionary and holiday files are not backed up as part of the Address Book backup procedure(s) described above. Therefore, if you have customized the dictionary or holidays, you need to back up those files separately, especially before upgrading or re-installing Maximizer.

To back up the dictionary and holiday files, copy them from the following location and paste them to another location, preferably the same location where your Address Book is backed up.

The user dictionary file is unique to each Maximizer workstation, so you will need to back up this file for each workstation.

User Dictionary File Location:

By default, the Maximizer program folder is C:\Program Files\Maximizer. If Maximizer was installed in a different folder, then change the path accordingly.

C:\Program Files\Maximizer\MaData6\Userdict.lex

Holiday File Location:

C:\Program Files\Maximizer\MaData6\Mxzhol.nam

Changing Languages for the Maximizer Spell Checker

In many of the Maximizer dialog boxes, you can use the Maximizer Spell Checker to check the spelling of text. By default, the selected language is American English, but you can change this language to any other of the following languages:

- Brazilian Portuguese
- British English
- Canadian French
- Spanish

➤ To change the language for the spell checker

1. Open the Maximizer Word Processor.
2. Select **Options** from the **Tools** menu.
3. In the **Spelling** tab, choose a language from the **Currently installed languages** list.

Appendix A

Crystal Reports Database Views/Tables Reference

Maximizer Database Views/Tables Reference

In this chapter...

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"SQL Views and Data Tables" on page 512

Overview

This chapter is a technical reference for using Crystal Reports with Maximizer data. For more how-to information about generating and storing Crystal Reports for Maximizer, refer to "Crystal Reports" on page 416. For information on Maximizer SQL views and tables, refer to the Customization Suite documentation.

Data Population for the Current Window

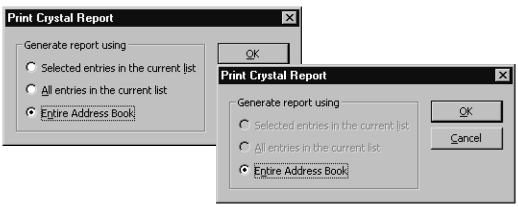
For more information on user access rights for creating Crystal Reports, see the *Maximizer CRM Administrator's Guide*.

When you create a new report template or edit an existing report template, the default table/view for the report is based on the current Maximizer window. You are connected to the **MAS_[Address Book name] for Microsoft SQL** data source by default. If you want to link to additional tables, you must do so in the **Database Expert** dialog box in Crystal Reports. See "Linking" on page 507 for more information.

Following is a list of each controlling window and its associated default table and file names used for Crystal Reports.

Controlling Window	Views for Microsoft SQL
Address Book	AMGR_Client
Opportunity	Opp_View
Campaigns	AMGR_Opportunity
Hotlist	AMGR_Hotlist
Customer Service	CSCases_View

If you are not in the controlling window that corresponds with the type of report you choose, you are limited to running the report on all entries in the Address Book rather than a selected or current entry list.



Database Views for User-Defined Fields

When you create a user-defined field, a database view for that user-defined field is also created. You can use these views to report on user-defined fields in Crystal Reports. For example, when a new Address Book user-defined field called “Salary” is created, a new view named “A_Salary” is dynamically created. Based on the type of user-defined field, the view name is prefixed by a designated letter. The following table identifies the view name prefixes for each type of user-defined field.

Microsoft SQL View Prefixes

The Microsoft SQL driver creates database views for user-defined fields, using the following prefixes.

Prefix	Type of user-defined field
A_	Address Book
BP_	Third-Party Integration
C_	Campaign
CS_	Customer Service
O_	Opportunity
U_	Users
S_	System

Database Driver Used to Create Crystal Reports

Maximizer uses the native SQL Server driver (MAS_ DSN) exclusively to create Crystal Reports in this version of the software. However, Crystal Reports created in some previous versions of Maximizer were created using the Maximizer ODBC driver.

The Maximizer ODBC driver is still supported for compatibility reasons with previous versions of Maximizer. If you are creating new reports for use with Maximizer, use the SQL Server driver.

Filtering Data

In order to report on particular types of data, you need to use selections or filtering in Crystal Reports. Use the Select Expert (Report > Select Expert) to select or filter data for your report. In the case of the Address Book table/view, use the Record_Type field to select or filter Address Book entries. For example, to create a report that only shows Company records, use the Select Expert to return only those records where "Record_Type = 1".

You can also filter or select the data for the report using Maximizer. Once a report has been saved, populate the appropriate Maximizer windows with the desired information then run the personal report and select the all entries in the current list option.

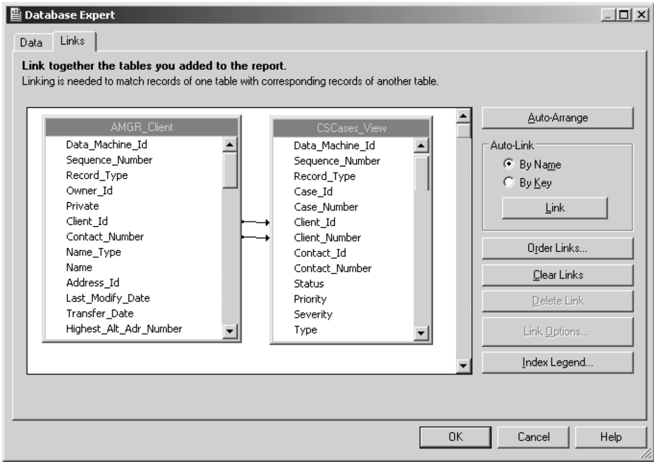
Maximizer contains default records in many of the common modules. These are denoted by an "@" sign and can be filtered using the Select Expert by using the "does not start with" criteria as illustrated in the following graphic.

Address Book Entry Data Type	Record Type for Microsoft SQL
Company	Record_Type = 1
Individual	Record_Type = 2
Contact	Record_Type = 31
Individual Contact	Record_Type = 32
Default Entry	Record_Type = 5
Alternate Address for Contact	Record_Type = 41
Alternate Address for Individual	Record Type = 42

Linking

Linking determines how the report data elements are related. For example, to report all notes related to an Address Book Entry you would link the Client_Id and Contact_Number fields of the AMGR_Client view to the fields of the same name in Notes.

Crystal Reports enables you to specify the type of join and type of link you want to use when linking tables. Joins and links indicates how linked fields in two tables are compared when records are read. Join, enforce, and link options can be specified in the Links Options dialog box. Using the various join enforcement options can ensure that linked tables are included in the SQL query, even when none of the fields in the table are used in the report. The Crystal Reports help files contain more information on Linking options.



Controlling Windows

As mentioned previously, when you choose to create a new report template or edit an existing template, the default view for the report is based on the active controlling window. Following is an example of a controlling window in Maximizer outlining the associated view name, links, and common selections.

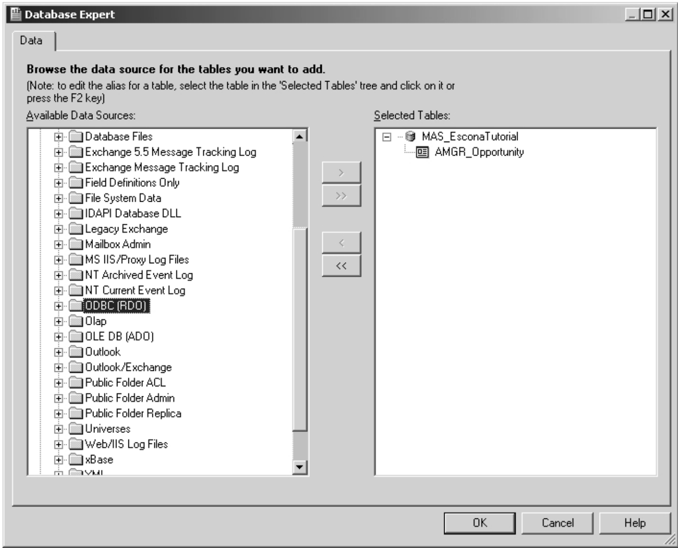
Customer Service Window Example

Each customer service case created for an Address Book entry is a record in the CSCases_View view. To report on cases for Address Book entries, you must add the view and link it to the Address Book entry table according to the following table.

Case	**Microsoft SQL**	**Maximizer ODBC**
Case view name	CSCases_View	CSCases
Links	Client_Id => Client_Id Contact_Number => Client_Number	Client_Id => Client_Id Contact_Number => Client_Number

Including Additional Views in Your Reports

To include additional views in your reports, you must link them to the parent table of the controlling window. You do so through the Database Expert (Database > Database Expert) by linking to the data source.

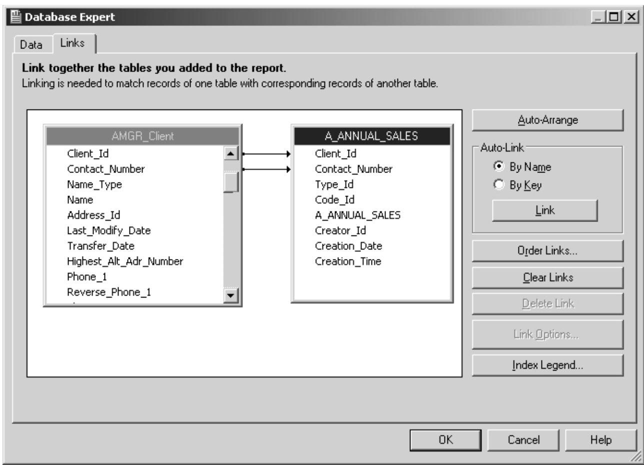


User-Defined Fields Example

When a new User-Defined Field is created, a new database table or view for that User-Defined Field is also created. User-Defined Fields can be associated with Address Book, Campaign, Opportunity, Customer Service, and Users. Use the Database Expert (Database > Database Expert) to include a user-defined field and link it to the desired parent view/table.

The following example is using a user-defined field named "Annual Sales".

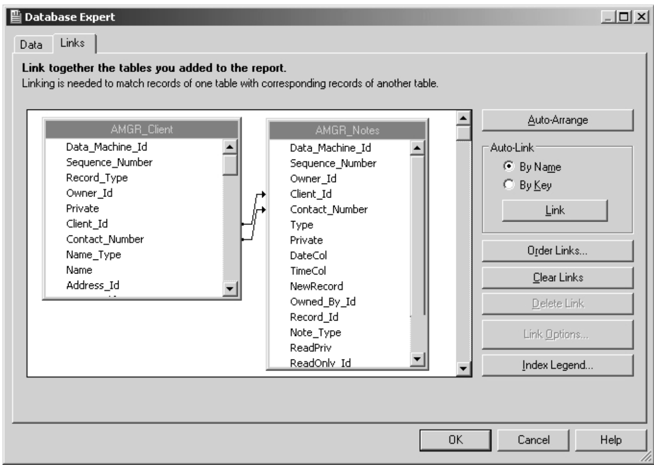
User-Defined Field	**Microsoft SQL**	**Maximizer ODBC**
User-defined field view name	A_<user-defined field name> example: A_ANNUAL_SALES	U_<user-defined field name> example: U_ANNUAL_SALES
Links	Client_Id => Client_Id Contact_Number => Contact_Number	Client_Id => Client_Id Contact_Number => Contact_Number



Notes Example

Each note created for an Address Book entry is a record in the view called Notes. To report on notes associated with Address Book entries, you must add the view and link it to the Address Book entry table according to the following table.

Note	Microsoft SQL
Notes view name	AMGR_Notes
Links	Client_Id => Client_Id Contact_Number => Contact_Number



SQL Views and Data Tables

Following is an appendix of the most common Maximizer SQL views and tables.

AMGR_Client View

The AMGR_Client View contains name, address, phone number, and email address information for Address Book entries, including Companies, Individuals, and Contacts, as well as alternate addresses and default entries. Many other tables in the database reference the Client_Id and Contact_Number fields of this table.

Note

This view supports insert, modify, and delete actions and supports MaxExchange transaction journalling.

Table 1 AMGR_Client View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Record_Type	String	2		Type of Address Book entry: 1 = Company 2 = Individual 5 = Default entries 31 = Company Contact 32 = Individual Contact 41 = Company or Company Contact alternate address 42 = Individual or Individual Contact alternate address
Owner_Id	String	11		
Private	Integer	4		
Client_Id	String	23		Unique client identification string.
Contact_Number	Integer	4		Unique client identification number. 0 = Company or Individual record < 60,000 = Contact record > 59,999 = Alternate address
Name_Type	String	1		C = Company I = Individual, Contact, Default entry, or Alternate address

Table 1 AMGR_Client View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Name	String	79		One of the following: • Company name • Individual last name • Contact last name • Alternate address description • Default Entry
Address_Id	Integer	4		0 = Use default address Value other than 0 = Contact_Number of address to use for this Address Book entry.
Last_Modify_Date	DateTime	8		
Transfer_Date	DateTime	8		Date and time when the last transfer occurred.
Highest_Alt_Adr_Number	Integer	4		Highest alternate address number in use.
Phone_1	String	21		
Reverse_Phone_1	String	21		
Phone_1_Extension	String	21		
Phone_2	String	21		
Reverse_Phone_2	String	21		
Phone_2_Extension	String	21		
Phone_3	String	21		
Reverse_Phone_3	String	21		
Phone_3_Extension	String	21		
Phone_4	String	21		
Reverse_Phone_4	String	21		
Phone_4_Extension	String	21		
Highest_Contact_No	Integer	4		

Table 1 AMGR_Client View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Receives_Letters	Integer	4		Indicates whether Contact (Record_Type = 31 or 32) receives mail sent to the Company/ Individual: 0 = Contact doesn't receive mail sent to Company/Individual 1 = Contact receives mail sent to Company/Individual **Note:** • For Individual records (Record_Type = 2), this value is always 1. • For Company records (Record_Type = 1) and alternate addresses (Record_Type = 41 or 42), this value is always 0.
Use_Client_Name	Integer	4		Applies to Contacts (Record_Type = 31 or 32) only. Indicates whether the Contact's Company/Individual name should be included in the address: 0 = Do not include Company/ Individual name in address 1 = Include Company/Individual name in address
First_Name	String	79		
Initial	String	79		Middle name or initials.
MrMs	String	79		
Title	String	79		
Salutation	String	79		
Department	String	79		
Firm	String	79		The Company Name of an Individual record. Applies to Individual (Record_Type = 2) records only.
Division	String	79		
Address_Line_1	String	79		
Address_Line_2	String	79		

Table 1 AMGR_Client View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
City	String	79		
State_Province	String	79		
Country	String	79		
Zip_Code	String	79		
Last_Client_Id	String	23		Last Client ID used for transfer.
Record_Id	Integer	4		
Creator_Id	String	11		
Create_Date	DateTime	8		
Updated_By_Id	String	11	AMGR_Client. Updated_By_Id = ADMN_User_ Details.User_Id	User_Id of user who most recently updated the Address Book entry.
Reports_To_ Contact_Number	Integer	4	AMGR_Client. Reports_To_Contac t_Number = AMGR_Client. Contact_Number	Contact_Number of Contact (Record_Type = 31 or 32) to whom this contact reports (e.g., contact's supervisor or manager). Applies only to Contact records (Record_Type = 31 or 32).
Assigned_To	String	11	AMGR_Client. Assigned_To = ADMN_User_Detail s.User_Id	User_Id of user assigned to the Address Book entry as the Account Manager. Applies to Company (Record_Type = 1), Individual (Record_Type = 2), and Default Entry (Record_Type = 5) records only.
ReadPriv	Integer	2		
ReadOnly_Id	String	11		
Phone_1_Desc	String	21		
Phone_2_Desc	String	21		
Phone_3_Desc	String	21		
Phone_4_Desc	String	21		
Email_1_Desc	String	15		
Email_2_Desc	String	15		
Email_3_Desc	String	15		

Table 1 AMGR_Client View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Lead_Status	Integer	2		0 = Not a sales lead 1 = Sales lead Applies to Company (Record_Type = 1) and Individual (Record_Type = 2) records only.
Change_Bits	Binary	8		MaxMerge Change Field. Used by Maximizer.
Contact_Inherits_ UDFs	Integer	2		"New contact inherits user-defined fields" checkbox in Company and Individual Address Book entries. 0 = Contact does not inherit UDFs 1 = Contact inherits UDFs
Territory_Status	Integer	2		Indicates how the territory was set. 0 = Unassigned 1 = Unaligned 101 = Set by user 102 = Set by rule 201 = Set by manager **Note:** Unaligned status is used when territory alignment moves an Address Book entry from a defined territory so that it no longer falls under any of the territory criteria. The old territory remains in the Territory_ID field.
Territory_ID	Numeric	10	AMGR_Client. Territory_ID = AMGR_Territory. Territory_ID	Unique identification number.

Company View

The Company View includes fields from AMGR_Client for Company Address Book entries.

Note

This view is read-only.

Table 2 Company View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Record_Type	String	2		Record identifier.
Owner_Id	String	11		
Private	Integer	2		If modified, all contacts and addresses with the same Client_Id will also be modified.
Client_Id	String	23		Unique identification number. System generated if field is Null and "System to assign Address Book entries' Identification field values" option is selected in Administrator (File > Preferences > System Options). Must be unique. Non-modifiable.
Contact_Number	Integer	2		Always 0
Name_Type	String	1		Always C
Company_Name	String	79		Name of Company. Mandatory field.
Address_Id	Integer	2	AMGR_Client.(Client_Id, Address_Id)	Points to the address to use. 0 to use main address or must already exist in the Address table. >= 60000 means unsigned.
Department	String	79		
Firm	String	79		
Division	String	79		
Address_Line_1	String	79		

Table 2 Company View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Address_Line_2	String	79		
City	String	79		
State_Province	String	79		
Country	String	79		
Zip_Code	String	79		
Last_Modify_Date	DateTime	8		
Last_Modify_Time	DateTime	11		
Transfer_Date	DateTime	8		Date and time of transfer. If left empty, it defaults to the system clock.
Transfer_Time	DateTime	11		
Phone_1	String	21		
Phone_1_Extension	String	21		
Phone_1_Desc	String	21		
Phone_2	String	21		
Phone_2_Extension	String	21		
Phone_2_Desc	String	21		
Phone_3	String	21		
Phone_3_Extension	String	21		
Phone_3_Desc	String	21		
Phone_4	String	21		
Phone_4_Extension	String	21		
Phone_4_Desc	String	21		
Change_Bits_Low	Binary	8		MaxMerge Change Field 1. Used by Maximizer. Do not use.
Change_Bits_High	Binary	8		MaxMerge Change Field 2. Used by Maximizer. Do not use.
Creator_Id	String	11		
Creation_Date	DateTime	8		Date and time when Company/ Individual record was created. Default value is current system date and time.
Creation_Time	DateTime	11		

People View

The People view includes fields from AMGR_Client for Individual and Contact entries.

Note

This view is read-only.

Table 3 People View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Record_Type	String	2		Record type indicator.
Owner_Id	String	11		
Private	Integer	2		
Client_Id	String	23	AMGR_Client. (Client_Id, Contact_Number)	Unique identification number. Valid values: 0–59999 • 0 = Individual • Value other than 0 = Contact Cannot modify. Pair (Client_Id, Contact_Number) must be unique.
Contact_Number	Integer	2		
Name_Type	String	1		
Last_Name	String	79		
Address_Id	Integer	2	AMGR_Client. (Client_Id, Address_Id)	Pointer to address record to use: • 0 = Use main address • >= 60,000 (unsigned) = Use alternate address
Department	String	79		
Firm	String	79		
Division	String	79		
Address_Line_1	String	79		
Address_Line_2	String	79		
City	String	79		
State_Province	String	79		
Country	String	79		
Zip_Code	String	79		

Table 3 People View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Last_Modify_Date	DateTime	8		
Last_Modify_Time	DateTime	11		
Transfer_Date	DateTime	8		Date and time of transfer.
Transfer_Time	DateTime	11		
Phone_1	String	21		
Phone_1_Extension	String	21		
Phone_1_Desc	String	21		
Phone_2	String	21		
Phone_2_Extension	String	21		
Phone_2_Desc	String	21		
Phone_3	String	21		
Phone_3_Extension	String	21		
Phone_3_Desc	String	21		
Phone_4	String	21		
Phone_4_Extension	String	21		
Phone_4_Desc	String	21		
Receives_Letters	Integer	2		Applies to Contacts only. 0 = Contact does not receive mail 1 = Contact receives mail (default)
Use_Client_Name	Integer	2		Applies to Contacts only. 0 = Do not include Company/ Individual name in mailing address 1 = (Default) Include Company/ Individual name in mailing address
First_Name	String	79		
Initial	String	79		
Mr/Ms	String	79		
Title	String	79		
Salutation	String	79		Salutation (e.g., Dear:) to use in correspondence.

Table 3 People View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Change_Bits_Low	Binary	8		MaxMerge Change Field 1. Used by Maximizer.
Change_Bits_High	Binary	8		MaxMerge Change Field 1. Used by Maximizer.
Creator_Id	String	11		
Creation_Date	DateTime	8		Date and time Individual or Contact was created. Default is current system date.
Creation_Time	DateTime	11		

AMGR_Appointments View

The AMGR_Appointments View includes both personal and Address Book-related appointments.

Note

This view supports insert, modify, and delete actions and supports MaxExchange transaction journalling.

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Owner_Id	String	11	AMGR_Appointments.Owner_Id = AMGR_Resources. Resource_Id – or – ADMN_Users.User_Id	User, location, or resource that the appointment is scheduled with. (There is a separate record for each user, location, and resource participating in the same appointment.) If the Location field includes a location that is not in the AMGR_Resources Table (Owner_Type=101), the Owner_Id value is L@FREEFORM.
App_Date	DateTime	8		Start date and time of appointment. Mandatory field.
Lead_Date	DateTime	8		Date and time when the appointment notification should take place. Default is 10 minutes prior to App_Date.

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
End_Date	DateTime	8		End date and time of appointment. Default is 30 minutes after App_Date.
Client_Id	String	23	AMGR_ Appointments. (Client_Id, Contact_Number) = AMGR_Client. (Client_Id, Contact_Number).	Client the appointment is associated with. If filled in, the entry must exist in the AMGR_Client View. Cannot modify.
Contact_Number	Integer	4		
Private	Integer	4		
Type	Integer	2		Identifies all records of a single appointment, group appointment, recurring appointment, or recurring group appointment. The value is 0 for a single-user appointment and is another unique value for a group, recurring, or recurring group appointment. **Note:** Recurring, group, and recurring group appointments consist of multiple records in the AMGR_Appointments Table—one for each user and one for each recurrence.
Alert_Flag	Integer	2		0 = Alarm not set 1 = Alarm set
Priority	String	4		Defines the priority text (e.g., Hi, MED, LOW).
Completed	Integer	2		0 = Appointment incomplete 1 = Appointment complete

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Icon_Type	Integer	2		Icon associated with the appointment: 0 = None 1 = Mail 2 = ToDo 3 = Phone 4 = Travel 5 = Sale 6 = Meal 7 = Presentation 8 = Speech 9 = Meeting **Note:** Icons can be viewed when an appointment is being created.
Rsvp	Integer	2		User's response to appointment invitation: 0 = No response 1 = User accepts appointment 2 = Declined 3 = Tentative response Cannot modify.
Recurring_Id	Integer	2		Unique recurring ID: • 0 = Not recurring • Other unique value = Identifier for records belonging to a recurring appointment
Appt_Rec_Freq	Integer	2		Frequency of recurring appointment: 0 = Daily 1 = Weekly 2 = Day of month (e.g., first Monday) 3 = Monthly (e.g., 14th) 4 = Yearly

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Appt_Num_Occur	Integer	2		Identifies relative day of recurring appointment (e.g., second Tuesday). Applies to weekly, day of month, and monthly appointments only. **Weekly appointments:** 0 = Every ___ 1 = Every second ___ 2 = Every third ___ ... 25 = Every 26th ___ **Day of month appointments:** 0 = Every 1st ___ of the month 1 = Every 2nd ___ of the month ... 31 = Every Last ___ of the month **Monthly appointments:** 0 = First ___ of the month 1 = Second ___ of the month 2 = Third ___ of the month 3 = Fourth ___ of the month 4 = Last ___ of the month
Appt_Day_Of_ Week	Integer	2		Day of recurring appointment (e.g., Friday). Applies to weekly, day of month, and monthly appointments only. **Weekly and Monthly appointments:** 0 = Sunday 1 = Monday 2 = Tuesday 3 = Wednesday 4 = Thursday 5 = Friday 6 = Saturday **Day of month appointments:** 0 = Day 1 = Weekday

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Skip_Weekend	Integer	2		Applies to daily appointments only. 0 = Default 1 = Daily appointments do not occur on weekends.
Move_To_Weekday	Integer	2		Applies to yearly appointments only. 0 = Default 1 = If appointment occurs on a weekend, move to nearest weekday
Rec_Start_Date	DateTime	8		Appointment start date.
Rec_End_Date	DateTime	8		Appointment end date. Mandatory if Rec_Start_Date is used.
PegBoardState	Integer	2		Peg board state during appointment: 0 = Unknown 1 = Busy 2 = Out (Default)
Record_Id	Integer	4		
Creator_Id	String	11		
Create_Date	DateTime	8		
Snooze_End_Date	DateTime	8		Date and time when a snoozed appointment will display a reminder.
Email_Date	DateTime	8		Date and time to send email appointment reminder. Applies only if Email_Flag is set to True (1).
Email_Flag	Integer	2		0 = Don’t send email reminder 1 = Send email reminder
Owner_Type	Integer	2		0 = User 1 = Location 2 = Resource 101 = Custom Location

Table 4 AMGR_Appointments View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Plan_Id	String	23	AMGR_Action Template.(Plan_Id, Plan_Number) = AMGR_ActionPlan Template.(Plan_Id, Plan_Number)	Unique identification value of the Action Plan template, as defined in AMGR_ActionPlanTemplate.
Plan_Number	Integer	4		Sequential number of the activity in the plan.
Master_Id	String	23	AMGR_Appointme nts.(Master_Id, Master_Number) = AMGR_CSCases. (Case_Id, Case_Number) – or – AMGR_ Opportunity.(Opp_ Id, Opp_Number)	Identifies the customer service case or opportunity the appointment is associated with.
Master_Number	Integer	4		
Entity_Type	Integer	4		Type of record this template is applicable to. Entity_Type values correspond to the Client_Id/ Contact_Number pair references on the right: 0 = Not specified (default for old notes) 1 = Address Book entry 2 = Opportunity 3 = Campaign 4 = User 5 = Customer service case 6 = Knowledge base 7 = Order 8 = Order item 9 = Default entry 100 = Custom Independent table 101 = Custom Child table
TextCol	String	1024		Text description of appointment.
Appointment_Id	String	24		Appointment identification string.
Appointment_ Number	Integer	4		Appointment identification number.

AMGR_Hotlist View

The AMGR_Hotlist View includes both personal and Address Book related tasks.

Note

This view supports insert, modify, and delete actions and supports MaxExchange transaction journalling.

Table 5 AMGR_Hotlist View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Owner_Id	String	11		If originated from AMGR_Opportunity_Link, it is the Owner Id of the Team Member responsible for the opportunity.
Schedule_Date	DateTime	8		Date of task. Mandatory field.
Client_Id	String	23	AMGR_Hotlist.(Client_Id, Contact_Number) = AMGR_Client.(Client_Id, Contact_Number)	Client who the task is associated with. Leave empty for a personal appointment. Otherwise it must already exist in the AMGR_Client table. Cannot modify. Contact_Number = 0–59999
Contact_Number	Integer	4		
Entry_Type	Integer	4		Flag for the source of the task. 0 = Manual task 1 = Task associated with follow-up deadline for customer service case 2 = Reserved system value. Do not use. 3 = Task created by a Date user-defined field that has the "Include in Hotlist" attribute 4 = Reserved system value. Do not use.
Original_Date	DateTime	8		Original date of the task. If left empty, it defaults to the system clock.
Type_Id	Integer	4		Pointer to date field in the Detail_List table. Cannot modify.

Table 5 AMGR_Hotlist View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Status_Id	Integer	4		Not in use.
Priority	String	4		Priority of task.
Completed	Integer	2		0 = Not complete 1 = Complete
Opp_Id	String	23	AMGR_Hotlist.(Opp_Id, Opp_Number, Step_Id, Activity_Id) = AMGR_Opportunity_Link.(Opp_Id, Opp_Number, Step_Id, Activity_Id)	Identifier of the associated opportunity related to the AMGR_Opportunity_Link that the task originated from. Must already exist in the AMGR_Opportunity_Link table. Opp_Number = 0.
Opp_Number	Integer	4		
Step_Id	Numeric	9		Must already exist in the AMGR_Opportunity_Link table, unless it's a follow-up activity.
Activity_Id	Numeric	9		Must already exist in the AMGR_Opportunity_Link table.
Alarm	Integer	2		0 = No alarm set 1 = Alarm set
Icon_Type	Integer	2		Icon associated with the task: 0 = None 1 = Mail 2 = ToDo 3 = Phone 4 = Travel 5 = Sale 6 = Meal 7 = Presentation 8 = Speech 9 = Meeting Icons can be viewed when the Hotlist task is being created.
Lead_Date	DateTime	8		Date when alarm is to sound. If left empty, defaults to Schedule_Date.
End_Date	DateTime	8		Task end date.
Record_Id	Integer	4		
Creator_Id	String	11		
Create_Date	DateTime	8		

Table 5 AMGR_Hotlist View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Snooze_End_Date	DateTime	8		Date and time when the alarm deferral ends.
TextCol	String	255		Text of task. Mandatory field.
Related_To	Integer	4		Type of record this template is applicable to: 0 = Undefined. Defaults to Address Book. 1 = Address Book entry 2 = Opportunity 3 = Campaign 5 = Customer service
Plan_Id	String	23	AMGR_Hotlist.(Plan_Id, Plan_Number) = AMGR_ActionPlan Template.(Plan_Id, Plan_Number)	Unique identification value of the Action Plan, as defined in AMGR_ActionPlanTemplate.
Plan_Number	Integer	4		Sequential number of the activity in the plan.

AMGR_Resources Table

The AMGR_Resources table lists the users' display names (e.g,. Joe Napoli), locations (e.g., Staff Room), and resources (e.g., Projector) available in the Appointments dialog box.

Table 6 AMGR_Resources Table

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Record_Id	Integer	4		
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Record_Type	Integer	4		Resource_Id's type: 1 = User display name 2 = Location 3 = Resource
Resource_Id	String	12	AMGR_Resources. Resource_Id = ADMN_User_ Details.User_Id	Depends on Record_Type: • If Record_Type = 1 (User), then Resouce_Id = User_Id. • If Record Type = 2 (Location) or 3 (Resource), then Resource_Id is the unique ID of the location or resource.

Table 6 AMGR_Resources Table

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Creator_Id	String	11		
Create_Date	DateTime	8		
Name	String	80		Friendly name of the user or resource (e.g., Joe Napoli, Staff Room, Projector). Mandatory field. Unique Name.

AMGR_Notes View

The AMGR_Notes View includes history and notes for Address Book entries, opportunities, campaigns, etc..

Note

This view supports insert, modify, and delete actions and supports MaxExchange transaction journalling.

Table 7 AMGR_Notes View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Owner_Id	String	11		This field actually contains the Creator_Id, not the Owner_Id.
Client_Id	String	23	AMGR_Notes. (Client_Id, Contact_Number) = AMGR_Client (Client_Id, Contact_Number) – or – AMGR_ Opportunity (Opp_ Id, Opp_Number)	Client_Id/Contact_Number or Opp_Id/Opp_Number of the record the Note is associated with. Associated record must already exist. Mandatory field. Must provide Client_Id/Contact_Number for insert. Cannot update.
Contact_Number	Integer	4		

Table 7 AMGR_Notes View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Type[a]	Integer	4		Can insert. Can update. Valid values: 0–32,767 Standard Maximizer note types and Detail note types may be specified: 0 = Manual note 1 = Mail-out note 2 = Phone call note 3 = Timed note 4 = Transfer note 5 = Completed task or appointment 6 = Scheduled task or appointment 7 = Email sent note 8 = Opportunity created or opportunity status changes 9 = History note 10 = Reassign task note 11 = Reserved for future use 12 = Customer service
Private	Integer	4		
DateCol	DateTime	8		Date and time when note was created. Default is current system date and time. Can insert. Can update.
TimeCol	DateTime	8		
NewRecord	Integer	4		Maximizer system field. Do not use.
Owned_By_Id	String	11		
Record_Id	Integer	4		
Note_Type	String	20		Within Maximizer, this string is used only for display purposes to indicate a sub-type of note. If a standard type is defined in the Type field, this string is appended to the standard type name for display. In Maximizer, this field appears as Category on the Note dialog box for manual notes only. Can insert. Can update.
ReadPriv	Integer	2		

Table 7 AMGR_Notes View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
ReadOnly_Id	String	11		
SynchFlags	Integer	4		Do not use this field. It is reserved for use by MaxExchange.
Entity_Type	Integer	2		Specifies the type of parent record the note belongs to. Entity_Type values correspond to the Client_Id/ Contact_Number pair references on the right: 0 = Not specified (default for old notes) 1 = Address Book entry 2 = Opportunity 3 = Campaign 5 = Customer service case 10 = Appointment 100 = Custom Independent table 101 = Custom Child table This field must be specified upon note insert, and it cannot be updated later.
TextCol	Text	9216		Text of Note. Can insert. Can update.

a. Some Maximizer functions, such as purging, searching, and MaxExchange synchronization, do not support user-defined note types, which have a Type value greater than 17.

CMGR_Auto_Campaign_Accounts Table

The CMGR_Auto_Campaign_Accounts Table contains details about the Address Book entries that are subscribed to an automated campaign.

Table 8 CMGR_Auto_Campaign_Accounts Table

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Record_Id	Integer	4		
CampID	String	24	CMGR_Auto_ Campaign_ Accounts.CampID = AMGR_ Opportunity. Opp_Id	Unique identifier of the campaign. Insert operations are allowed, but not delete and update operations.
ClientID	String	24	CMGR_Auto_ Campaign_ Accounts.(ClientID, ContactNo) = AMGR_Client. (Client_Id, Contact_Number)	Client_Id and Contact_Number of Address Book entries subscribed to the campaign. Insert operations are allowed, but not delete and update operations.
ContactNo	Integer	4		
StartDate	DateTime	8		Date when the Address Book entry was subscribed to the campaign.
NextDate	DateTime	8		Date when the next campaign activity for the Address Book entry should be processed. Applies to ongoing campaigns.
AccStatus	Integer	4		Not in use.
ActCount	Integer	4		Next campaign activity to process for the Address Book entry.
ActType	Integer	4		Not in use.
ActFlag	Integer	4		Not in use.

AMGR_CSCases View

The AMGR_CSCases View stores information about customer service cases.

Note

This view supports insert, modify, and delete actions and supports MaxExchange transaction journalling.

Table 9 AMGR_CSCases View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Record_Id	Integer	4		
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Record_Type	Integer	4		0 = Customer service case 1 = Customer service user
Case_Id	String	23		Unique customer service case identifier. Case_Number is always 0.
Case_Number	Integer	4		
Client_Id	String	23	AMGR_CSCases.(Client_Id, Contact_Number) = AMGR_Client.(Client_Id, Contact_Number)	Reference to client.
Client_Number	Integer	4		
Contact_Id	String	23	AMGR_CSCases.(Contact_Id, Contact_Number) = AMGR_Client.(Client_Id, Contact_Number)	Reference to default contact.
Contact_Number	Integer	4		
Status	Integer	4		Case status: 57999 = Unassigned 57998 = Assigned 57997 = Escalated 57996 = Callback 57995 = WaitCustomer 57994 = Cancelled 57993 = Resolved Pointer to value in System UDFs (60041).
Priority	Integer	4		Case priority: 57900 = Low 57901 = Medium 57902 = High
Severity	Integer	4		Case severity: 57900 = Low 57901 = Medium 57902 = High

Table 9 AMGR_CSCases View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Type	Integer	4		Case type. Pointer to value in system UDFs (60022).
Reason	Integer	4		Case reason. Pointer to value in system UDFs (60023).
Origin	Integer	4		Case origin. Pointer to value in system UDFs (60024).
Queue	Integer	4		Case queue. Pointer to value in system UDFs (60029).
Class	Integer	4		No longer in use.
Area	Integer	4		No longer in use.
Fee	Float	8		Case fee. (BillRate x BillableTime = Fee).
BillRate	Float	8		Cost per hour of billable time.
BillableTime	Float	8		Number of billable hours.
Fee_Type	Integer	4		Case fee type. Pointer to value in system UDFs (60027).
Assigned_To_Id	String	11	AMGR_CSCases. Assigned_To_Id = ADMN_User_Details.User_Id	User_Id of user who the case is assigned to.
Deadline_Date	DateTime	8		Follow-up deadline date.
Creator_Id	String	11		
Create_Date	DateTime	8		
Modified_By_Id	String	11		
Last_Modify_Date	DateTime	8		
Owner_Id	String	11		Case owner.
Private	Integer	4		Not in use.
Solution_Id	String	24	AMGR_CSCases. (Solution_Id, Solution_Number) = AMGR_Documents. (Document_Id, Document_Number)	For resolved cases, it points to a knowledge base article with the case solution.
Solution_Number	Integer	4		

Table 9 AMGR_CSCases View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Subject	String	128		Subject line of the case.
Article_Number	String	24	AMGR_CSCases.(Article_Number) = AMGR_Documents.(Document_Id, Document_Number)	Points to the solution article in AMGR_Documents table when the Solution_Id and Solution_Number fields are empty. This field is intended for remote users who don't have access to the knowledge base database but know the article number for this case in the main database. The remote user fills in this field manually, and when the case is synchronized with the main database, it will reference the article in the knowledge base.
Notify_Flag	Integer	4		Customer service case notification flag: 0 = Notification disabled 1 = Notification sent to default list of users 2 = Notification sent to custom list of users
Case_Resolved_By	String	12	AMGR_CSCases.Case_Resolved_By = ADMN_Users.User_Id	User ID of the user who resolved the case.
Case_Resolved_Date	DateTime	8		Date and time when the case was resolved.
Case_Owner_Id	String	12		
Description	Text	16		Description of the case.

CSCases_View

The CSCases_View View includes all the fields from the AMGR_CSCases Table and the following additional fields.

Note

This view is read-only.

Table 10 CSCases_View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
User_Case_Id	String	32		Case identifier for user references.
Client_Name	String	80	AMGR_CSCases. (Client_Id, Client_Number)	Name of Company/Individual who originated the case. Name field from AMGR_Client table.
Contact_Name	String	160	AMGR_CSCases. (Contact_Id, Contact_Number)	Name of the contact for the case. “First_Name, Name” field concatenation from Case Contact.
Solution_Name	String	256	AMGR_CSCases. (Solution_Id, Solution_Number)	Knowledge base article description of this case.
Type_Name	String	80	AMGR_User_Field_ Defs_Tbl. (Type_Id = 60022, Table_Id = 2, Code_Id)	Text value of the Type field
Reason_Name	String	80	AMGR_User_Field_ Defs_Tbl. (Type_Id = 60023, Table_Id = 2, Code_Id)	Text value of the Reason field.
Origin_Name	String	80	AMGR_User_Field_ Defs_Tbl. (Type_Id = 60024, Table_Id = 2, Code_Id)	Text value of the Origin field.
Queue_Name	String	80	AMGR_User_Field_ Defs_Tbl. (Type_Id = 60029, Table_Id = 2, Code_Id)	Text value of the Queue field.
Class_Name	String	80		No longer in use.
Area_Name	String	80		No longer in use.
Fee_Type_Name	String	80	AMGR_User_Field_ Defs_Tbl. (Type_Id = 60027, Table_Id = 2, Code_Id)	Text value of the Fee_Type field.

Table 10 CSCases_View

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Status_Name	String	80	AMGR_User_Field_ Defs_Tbl. (Type_Id = 60041, Table_Id = 2, Code_Id)	Text value of the Status field: 57999 = Unassigned 57998 = Assigned 57997 = Escalated 57996 = Callback 57995 = WaitCustomer 57994 = Cancelled 57993 = Resolved
Assigned_To_Name	String	160		Name of the user responsible for the case.
Case_Owner_Name	String	160		Name of the user who owns the case.
Address_Line_1	String	80		Address information of the Company/Individual who originated the case.
Address_Line_2	String	80		
City	String	80		
State_Province	String	80		
Country	String	80		
Zip_Code	String	80		
Priority_Name	String	80		Text value of the Priority field: 57900 = Low 57901 = Medium 57902 = High
Severity_Name	String	80		Text value of the Severity field: 57900 = Low 57901 = Medium 57902 = High

AMGR_Opportunity View

The AMGR_Opportunity View contains information about

- Sales Opportunities (Opp_Type=0),
- Traditional Marketing Campaigns (Opp_Type=30), and
- Automated Marketing Campaigns (Opp_Type=10, 15, or 20).

Use “Opp_View” on page 106, instead of AMGR_Opportunity view, for reporting on opportunities.

Note

This view supports insert, modify, and delete actions and supports MaxExchange transaction journalling.

Opportunities

Table 11 AMGR_Opportunity View – Opp_Type = 0 (Opportunity)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Client_Id	String	24	AMGR_ Opportunity. (Client_Id, Contact_Number) = AMGR_Client. (Client_Id, Contact_Number)	Company/Individual that is associated with the opportunity. Mandatory field. Associated entry must already exist in the AMGR_Client table. Cannot modify.
Contact_Number	Integer	4		Not used. Reserved for future use. Always 0.
Opp_Id	String	23	AMGR_ Opportunity. (Opp_Id, Opp_Number) = AMGR_Opportunit y_Link.(Opp_Id, Opp_Number)	Unique identifier of an Opportunity. System generated.
Opp_Number	Integer	4		Unique identifier of an Opportunity. Must be 0.
Comp_Client_Id	String	24	AMGR_ Opportunity. (Comp_Client_Id, Comp_Cont_No) = AMGR_Opportunit y_Link.(Client_Id, Contact_Number)	Client_Id and Contact_Number of Competitor that the Opportunity was lost to.
Comp_Cont_No	Integer	4		

Table 11 AMGR_Opportunity View – Opp_Type = 0 (Opportunity)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Owner_Id	String	11		Team member that is chosen as the Opportunity leader. If Team ID is equal to -1 (no Team is assigned, i.e., this is a Personal Opportunity), then it defaults to the Login ID.
Strategy_Id	Numeric	9	AMGR_ Opportunity. Strategy_Id = AMGR_Strategy. Strategy_Id	Strategy that has been assigned to the Opportunity. Strategy_Id must already exist in the AMGR_Strategy table. If the strategy is 4294967295 (0xFFFFFFFF), no strategy is assigned to the Opportunity.
Team_Id	Integer	4	AMGR_ Opportunity. (Owner_Id, Team_Id) = EXCH_Sites. (Owner_Id, Team_Id)	Team_Id of Sales team assigned to this Opportunity, or 65535 (0xFFFF) if assigned to a single user. Team_Id must already exist in EXCH_Sites table. Mandatory field.
Status	Integer	4		Status of the Opportunity: 0 = New 1 = In progress 2 = In progress new 3 = Won 4 = Lost 5 = Abandoned 6 = Suspended
Name	String	80		Name of Company/Individual that is associated with the Opportunity.
Objective	String	254		Sales Objective for the Opportunity.
Reason_Id	Numeric	9	AMGR_ Opportunity. Reason_Id = AMGR_OMS_ Object.Step_Id	Reason why the opportunity was won, lost, abandoned, or suspended. Only the Opportunity Leader user can modify this field. 0 = Opportunity still in progress

Table 11 AMGR_Opportunity View – Opp_Type = 0 (Opportunity)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Probability_Closing	Integer	2		Percentage probability of closing the opportunity. Based on an internal calculation formula. Valid values: 0–100. Only the Opportunity Leader user can modify this field. (May be updated automatically by selecting "Update Opportunity" in Opportunities window.)
Cost	Float	8		Running total of the costs associated with activities for the opportunity.
Forecast_Revenue	Float	8		Revenue anticipated from Opportunity once it is successfully complete. Only the Opportunity Leader user can modify this field.
Start_Date	DateTime	8		Date when the opportunity was started. If left empty, defaults to the system clock. If 1, only the Opportunity Leader user can modify this field.
Estimated_Close_Date	DateTime	8		Start_Date + Strategy Duration = Estimated_Close_Date. Original close date for the opportunity. Must be greater than Start_Date. Only the Opportunity Leader user can modify this field. If specified, becomes the Close_Date by default.
Close_Date	DateTime	8		Projected or actual close date of the opportunity. Updated as the opportunity's steps are applied before or ahead of schedule. Must be greater than Start_Date. Only the Opportunity Leader user can modify this field.
Last_Modify_Date	DateTime	8		Close date specified by user, not calculated from steps and activities. (Date and time when campaign was last modified stored in Last_Update_Date.)

Table 11 AMGR_Opportunity View – Opp_Type = 0 (Opportunity)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Actual_Revenue	Float	8		Actual revenue generated by the opportunity. Applicable only if Status = 3.
Record_Id	Integer	4		
Creator_Id	String	11		
Create_Date	DateTime	8		
Suspend_Date	DateTime	8		The date an opportunity was suspended. Applies only to opportunities using a strategy.
Days_Suspended	Integer	4		The number of days an opportunity was suspended. Applies only to opportunities using a strategy, where the opportunity is suspended and then resumed after one day or more.
Dynamic_Strat	Integer	2		0 = Static strategy 1 = Dynamic strategy **Note:** A strategy becomes dynamic after it has been assigned to an opportunity and then one or more of the Steps has been modified in that opportunity.
Dynamic_Team	Integer	2		0 = Static team 1 = Dynamic team **Note:** A team becomes dynamic after it has been assigned to an Opportunity and then a team member is added or removed from the team for that Opportunity.
Opp_Type	Integer	2		Opportunity or campaign type: **0 = Opportunity** 10 = Fixed-date automated campaign 15 = Ongoing automated campaign 20 = Automated campaign from web 30 = Traditional campaign

Table 11 AMGR_Opportunity View – Opp_Type = 0 (Opportunity)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Comment	String	508		Any comments about the opportunity. Only the Opportunity Leader user can modify this field.
Completion_ Comment	String	508		Any comments related to the completion of the opportunity. Applicable only if the Status is won, lost, abandoned, or suspended.
Last_Update_Date	DateTime	8		Date and time when the record was last modified.
Updated_By_Id	String	11	AMGR_ Opportunity. User_Id = ADMN_Users. User_Id	User_Id of the user who last changed the opportunity.
TestStatus	Integer	4		Applies only to records where Opp_Type = 10, 15, or 20.
Last_Opp_Id	String	23		Stores original Opp_Id when it is changed during transfer between databases.
Cont_Client_Id	String	23	AMGR_ Opportunity. (Cont_Client_Id, Cont_Cont_No) = AMGR_Client. (Client_Id, Contact_Number)	Client_Id of the associated Contact. Applicable only when Opp_Type = 0.
Cont_Cont_No	Integer	4		Contact_Number of the associated Contact. Applicable only when Opp_Type = 0.
NextAction	String	63		Next action in the Action Plan for this opportunity, as defined by the user. Applicable only when Opp_Type = 0.
NextAction_ Projected	String	63		Next action in the Action Plan for this opportunity, as defined by the strategy. Applicable only when Opp_Type = 0.
Revenue_Currency_ Id	String	4		Three-character currency ID of the corporate or entry currency for the opportunity. Applicable only if multi-currency is enabled for the Address Book.

Table 11 AMGR_Opportunity View – Opp_Type = 0 (Opportunity)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Revenue_Rate_Type_Id	Integer	2		Reserved for future use. Do not use.
Last_Cal_Date	DateTime	8		Not applicable to opportunities.
Calculated_Won_Revenue	Float	8		Not applicable to opportunities.
Calculated_In Progress_Revenue	Float	8		Not applicable to opportunities.

Automated Campaigns

Table 12 AMGR_Opportunity View – Opp_Type = 10, 15, 20 (Automated Campaign)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Client_Id	String	23	AMGR_Opportunity.(Client_Id, Contact_Number) = AMGR_Client.(Client_Id, Contact_Number)	Not applicable.
Contact_Number	Integer	4		Not used. Reserved for future use. Always 0.
Opp_Id	String	24	AMGR_Opportunity.(Opp_Id) = CMGR_Auto_Campaign_Accounts.(CampID)	Unique identifier of an automated campaign. System generated.
Opp_Number	Integer	4		Always 0.
Comp_Client_Id	String	24	AMGR_Opportunity.(Comp_Client_Id, Comp_Cont_No) = AMGR_Opportunity_Link.(Client_Id, Contact_Number)	Not applicable to campaigns.
Comp_Cont_No	Integer	4		

Table 12 AMGR_Opportunity View – Opp_Type = 10, 15, 20 (Automated Campaign)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Owner_Id	String	11		Team member that is chosen as the Opportunity Leader. If Team ID is equal to -1 (no team is assigned, i.e., this is a personal opportunity), then it defaults to the Login ID.
Strategy_Id	Numeric	9		ProgID of the automated campaign.
Team_Id	Integer	4		Always 65535 (0xFFFF) (single user). Mandatory field.
Status	Integer	4		Status of the campaign: 0 = New 1 = In progress 2 = In progress new 3 = Completed 5 = Abandoned 6 = Suspended
Name	String	80		Name of the automated campaign.
Objective	String	254		Name of the template used for the campaign.
Reason_Id	Numeric	9	AMGR_ Opportunity. Reason_Id = AMGR_OMS_ Object.Step_Id	Reason why the campaign was completed, abandoned, or suspended. Only the Campaign Leader user can modify this field. 0 = Campaign still in progress
Probability_Closing	Integer	2		Not applicable to campaigns. Always 0.
Cost	Float	8		Campaign budget.
Forecast_Revenue	Float	8		Revenue expected from campaign once it is successfully complete. Only the Campaign Leader user can modify this field.
Start_Date	DateTime	8		Start date of the automated campaign.
Estimated_Close_ Date	DateTime	8		Not applicable to campaigns.

Table 12 AMGR_Opportunity View – Opp_Type = 10, 15, 20 (Automated Campaign)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Close_Date	DateTime	8		Actual close date of the campaign. Must be greater than Start_Date. Only the Campaign Leader user can modify this field.
Last_Modify_Date	DateTime	8		Close date specified by user. (Date and time when campaign was last modified stored in Last_Update_Date.)
Actual_Revenue	Float	8		Actual revenue generated by the campaign. Applicable only if Status = 3.
Record_Id	Integer	4		
Creator_Id	String	12		
Create_Date	DateTime	8		
Suspend_Date	DateTime	8		Not applicable to automated campaigns.
Days_Suspended	Integer	4		Not applicable to automated campaigns.
Dynamic_Strat	Integer	2		Not applicable to automated campaigns.
Dynamic_Team	Integer	2		Not applicable to automated campaigns.
Opp_Type	Integer	2		Opportunity or Campaign type: 0 = Opportunity **10 = Fixed-cate automated campaign** **15 = Ongoing automated campaign** **20 = Automated campaign from web** 30 = Traditional campaign
Comment	String	508		Description of the campaign. Only the Campaign Leader user can modify this field.

Table 12 AMGR_Opportunity View – Opp_Type = 10, 15, 20 (Automated Campaign)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Completion_ Comment	String	508		Any comments related to the completion of the Campaign. Applicable only if the Status is Complete, Abandoned, or Suspended.
Last_Update_Date	DateTime	8		Date and time when the record was last modified.
Updated_By_Id	String	11	AMGR_ Opportunity. User_Id = ADMN_Users. User_Id	User_Id of the user who last changed the campaign.
TestStatus	Integer	4		0 = Not tested 1 = Tested Applies only to records where Opp_Type = 10, 15, or 20.
Last_Opp_Id	String	23		Applicable only when Opp_Type = 0.
Cont_Client_Id	String	23		Applicable only when Opp_Type = 0.
Cont_Cont_No	Integer	4		Applicable only when Opp_Type = 0.
NextAction	String	64		Applicable only when Opp_Type = 0.
NextAction_ Projected	String	64		Applicable only when Opp_Type = 0.
Revenue_Currency_ Id	String	4		Not applicable to campaigns.
Revenue_Rate_Typ e_Id	Integer	2		Reserved for future use. Do not use.
Revenue_Rate_Typ e_Id	Integer	2		Reserved for future use. Do not use.

Table 12 AMGR_Opportunity View – Opp_Type = 10, 15, 20 (Automated Campaign)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Last_Cal_Date	DateTime	8		Opportunity revenue is calculated as of the date specified in this field. Default is the current date.
Calculated_Won_ Revenue	Float	8		Revenue generated from won opportunities.
Calculated_In Progress_Revenue	Float	8		Revenue generated from opportunities still in progress.

Traditional Campaigns

Table 13 AMGR_Opportunity View – Opp_Type = 30 (Traditional Campaign)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Client_Id	String	23		Not applicable.
Contact_Number	Integer	4		Not used. Reserved for future use. Always 0.
Opp_Id	String	23		Unique identifier of a traditional campaign. System generated.
Opp_Number	Integer	4		Always 0.
Comp_Client_Id	String	24		Not applicable to campaigns.
Comp_Cont_No	Integer	4		
Owner_Id	String	11		Team member that is chosen as the Opportunity Leader. If Team ID is equal to -1 (no team is assigned, i.e., this is a personal opportunity), then it defaults to the Login ID.
Strategy_Id	Numeric	9	AMGR_ Opportunity. Strategy_Id = AMGR_Strategy. Strategy_Id	Strategy_Id of the Template that has been assigned to the Campaign. Strategy_Id must already exist in the AMGR_Strategy table. If the strategy is 4294967295 (0xFFFFFFFF), no template is assigned to the campaign.

Table 13 AMGR_Opportunity View – Opp_Type = 30 (Traditional Campaign)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Team_Id	Integer	4	AMGR_ Opportunity. (Owner_Id, Team_Id) = EXCH_Sites. (Owner_Id, Team_Id)	Team_Id of the Sales team assigned to the campaign, or 65535 (0xFFFF) if assigned to a single user. Team_Id must already exist in EXCH_Sites table. Mandatory field.
Status	Integer	4		Status of the campaign: 0 = New 1 = In progress 2 = In progress new 3 = Completed 5 = Abandoned 6 = Suspended
Name	String	80		Name of the traditional campaign.
Objective	String	254		Marketing objective of the traditional dampaign.
Reason_Id	Numeric	9	AMGR_ Opportunity. Reason_Id = AMGR_OMS_ Object.Step_Id	Reason why the campaign was completed, abandoned, or suspended. Only the Campaign Leader user can modify this field. 0 = Campaign still in progress
Probability_Closing	Integer	2		Not applicable to campaigns. Always 0.
Cost	Float	8		Campaign budget.
Forecast_Revenue	Float	8		Potential revenue anticipated from campaign once it is successfully completed. Only the Campaign Leader user can modify this field.
Start_Date	DateTime	8		Start date of a traditional campaign that is not using a template. Null for campaigns using a template.
Estimated_Close_ Date	DateTime	8		Not applicable to campaigns.

Table 13 AMGR_Opportunity View – Opp_Type = 30 (Traditional Campaign)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Close_Date	DateTime	8		Actual close date of the campaign. Updated as the campaign's steps are applied before or ahead of schedule. Must be greater than Start_Date. Only the Campaign Leader or MASTER user can modify this field.
Last_Modify_Date	DateTime	8		Not applicable to Opp_Type = 30. (Date and time when campaign was last modified stored in Last_Update_Date.)
Actual_Revenue	Float	8		Actual revenue generated by the Campaign. Applicable only if Status = 3.
Record_Id	Integer	4		
Creator_Id	String	11		
Create_Date	DateTime	8		
Suspend_Date	DateTime	8		The date the campaign was suspended. Applies only to campaigns using a template.
Days_Suspended	Integer	4		The number of days a campaign was suspended. Applies only to campaigns using a template, where the campaign is suspended and then resumed after one day or more.
Dynamic_Strat	Integer	2		0 = Static template 1 = Dynamic template **Note:** A template becomes dynamic after it has been assigned to a campaign and then one or more of the Steps has been modified in that campaign.
Dynamic_Team	Integer	2		0 = Static team 1 = Dynamic team **Note:** A team becomes dynamic after it has been assigned to a campaign and then a team member is added or removed from the team for that campaign.

Table 13 AMGR_Opportunity View – Opp_Type = 30 (Traditional Campaign)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Opp_Type	Integer	2		Opportunity or campaign type: 0 = Opportunity 10 = Fixed-date automated campaign 15 = Ongoing automated campaign 20 = Automated campaign from web **30 = Traditional campaign**
Comment	String	508		Any comments about the campaign. Only the Campaign Leader or MASTER user can modify this field.
Completion_Comment	String	508		Any comments related to the completion of the campaign. Applicable only if the Status is complete, abandoned, or suspended.
Last_Update_Date	DateTime	8		Date and time when the record was last modified.
Updated_By_Id	String	11	AMGR_Opportunity.User_Id = ADMN_Users.User_Id	User_Id of the user who last changed the campaign.
TestStatus	Integer	4		Applies only to records where Opp_Type = 10, 15, or 20.
Last_Opp_Id	String	23		Applicable only when Opp_Type = 0.
Cont_Client_Id	String	24		Applicable only when Opp_Type = 0.
Cont_Cont_No	Integer	4		Applicable only when Opp_Type = 0.
NextAction	String	64		Applicable only when Opp_Type = 0.
NextAction_Projected	String	64		Applicable only when Opp_Type = 0.
Revenue_Currency_Id	String	4		Not applicable to campaigns.

Table 13 AMGR_Opportunity View – Opp_Type = 30 (Traditional Campaign)

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Revenue_Rate_Type_Id	Integer	2		Reserved for future use. Do not use.
Last_Cal_Date	DateTime	8		Not applicable to traditional campaigns.
Calculated_Won_Revenue	Float	8		Not applicable to traditional campaigns.
Calculated_In Progress_Revenue	Float	8		Not applicable to traditional campaigns.

AMGR_Opportunity_Link Table

The AMGR_Opportunity_Link Table links various opportunity- and traditional campaign-related information with other tables. The type of information and tables it links depend on the value of the "Type" field. The use of numerous fields in this table also depends on the value of the "Type" field.

Table 14 AMGR_Opportunity_Link Table

Physical Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Data_Machine_Id	Numeric	9		
Sequence_Number	Numeric	9		
Opp_Id	String	24	AMGR_Opportunity_Link.(Opp_Id, Opp_Number) = AMGR_Opportunity.(Opp_Id, Opp_Number) – or – AMGR_Client.(Client_Id, Contact_Number)	Unique identifier of an opportunity or campaign. System generated. Opp_Number is always 0. Refer to AMGR_Client(Client_Id, Contact_Number) when Type =23.
Opp_Number	Integer	4		
Step_Id	Numeric	9		Unique identifier of the step the activity belongs to. Mandatory field. Cannot modify.

Table 14 AMGR_Opportunity_Link Table

Physical Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Activity_Id	Numeric	9		ID of the activity linked to the step. Mandatory field. Value must already exist in AMGR_OMS_ Object. Cannot modify. If Type = 1: Unique identifier of the activity. Otherwise, always 0.
Type	Integer	4		1 = Activity link for opportunity/ campaign step 2 = Step link for opportunity/ campaign 3 = Success factor standing link for opportunity/campaign 4 = Success factor standing link for opportunity role 5 = No longer used 8 = Competitor link for opportunity 13 = Contact link for opportnity/ campaign role 14 = Related entry link 15 = Company Library folder or document reference 20 = Partner link for opportunity 21 = Customer service notification default user 22 = Customer service notification user 23 = Partner link for Address Book entry
Client_Id	String	24	AMGR_ Opportunity_Link.(Client_Id, Contact_Number) = AMGR_Client. (Client_Id, Contact_Number) AMGR_ Opportunity_Link. (MesName = AMGR_User_Fields. (Client_Id) for Type_Id = 17 in AMGR_User_Fields	Company or Individual that is associated with the opportunity. Mandatory field. Associated entry must already exist in the AMGR_Client table. Cannot modify.
Contact_Number	Integer	4		

Table 14 AMGR_Opportunity_Link Table

Physical Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Status	Integer	2		0 = New 1 = In progress 2 = In progress new 3 = Won 4 = Lost 5 = Abandoned 6 = Suspended 3337 = Not applied 3338 = Reviewed 3339 = Behind 3340 = On schedule 3341 = Ahead 3342 = Complete 3676 = Waiting 3677 = Applied (Hotlist entry must exist with same Activity_Id)
Duration	Numeric	9		Duration of the activity or step, in seconds. Value must be between 0 and 2,500,000,000.0. Applicable only if Type = 1 or 2.
Cost	Float	8		Running total of the costs associated with activities of the opportunity. Value must be between 0.0 and 9,999,999,999.0. Applicable only if Type = 1 or 2.
Start_Date	DateTime	8		Date when the activity or step starts. If left empty, defaults to the system clock time. If 1, the date can be updated by the OppLeader only. Applicable only if Type = 1, 2, or 15.
End_Date	DateTime	8		Date when the activity or step ends.
Start_Time	DateTime	8		Time when the activity or step starts. If 01/01/1900, not followed by a time, then there is no start time.

Table 14 AMGR_Opportunity_Link Table

Physical Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Icon_Type	Integer	2		0 = None 1 = Mail 2 = ToDo 3 = Phone 4 = Travel 5 = Sale 6 = Meal 7 = Presentation 8 = Speech 9 = Meeting **Note:** Icons can be viewed when a record is being created or modified.
Alarm	Integer	2		0 = Alarm not set 1 = Alarm set
Alarm_Lead_Min	Integer	4		Lead time for alarm, in minutes. Value must be between 0 and 5,000,000.0. Up to 999 complete minutes, hours, days, or weeks can be entered in the GUI. (No partial minutes, days, or weeks.) Once 999 minutes has been reached the number must first be rounded up to the nearest whole hour and then converted back to minutes. (I.e., 1000 minutes is rejected but 1020 —17 hours— is accepted.) Once 999 hours has been reached the number must be converted to days and then back to minutes. The same theory applies once 999 days and weeks have been reached.
Resp_Mem_Id	Integer	4		ID of the team member responsible for activity. Applicable only if Type = 1.
With_Role_Id	Numeric	9		ID of the role that this activity is to be assigned to. Applicable only if Type = 1.
Priority	String	4		Priority (HI, LOW, MED, etc.) Applicable only if Type = 1.

Table 14 AMGR_Opportunity_Link Table

Physical Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Standing_Id	Numeric	9		ID of the Standing associated with this role. Applicable only if Type = 3, 4, or 15.
Score	Integer	2		Value (weight) of the success factor standing. Valid values: 0–100. Applicable only if Type = 1, 3, 4, or 15.
MesName	String	256		For Type = 15, contains names of folders, documents, and notes in the Company Library. For Type = 14 (related entries), contains relation id. This field is related to the Client_Id field in the AMGR_User_Fields where Type_Id = 60017.
Record_Id	Integer	4		
Creator_Id	String	12		
Create_Date	DateTime	8		
Follow_Up_Task	Integer	2		Applicable only if Type = 1 (Activity): 0 = No follow-up task 1 = Follow-up task
Opp_Type	Integer	2		Record type: 0 = Opportunity 10 = Automatic campaign 15 = Automatic recurring campaign 20 = Automaticcampaign from web 30 = Traditional campaign
NotReserved	String	22		Not in use.
Description	String	254		Description of the opportunity or campaign.

ADMN_User_Details Table

Table 15 ADMN_User_Details Table

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
Record_Type	Integer	4		
User_Id	String	11		
Old_Password	String	511		
User_MrMs	String	80		
User_FirstName	String	80		
User_Init	String	80		
User_Name	String	80		
User_Title	String	80		
User_Salutation	String	80		
User_Firm	String	80		
User_Route	String	80		
User_Div	String	80		
User_AddressLine1	String	80		
User_AddressLine2	String	80		
User_City	String	80		
User_State_ Province	String	80		
User_Zip_Code	String	80		
User_Country	String	80		
User_Phone_1	String	22		
User_Phone_1_ Extension	String	22		
User_Phone_2	String	22		
User_Phone_2_ Extension	String	22		
User_Phone_3	String	22		
User_Phone_3_ Extension	String	22		
User_Phone_4	String	22		

Table 15 ADMN_User_Details Table

Field Name	Data Type	Len.	Foreign Table Ref.	Description and Rules
User_Phone_4_ Extension	String	22		
User_Email_ Address	String	120		
User_WebSite	String	120		
User_CustomField1	String	120		
User_CustomField2	String	120		
User_CustomField3	String	120		
User_CustomField4	String	120		
Creator_Id	String	12		
Create_Date	DateTime	8		
LastUpdate_Date	DateTime	8		
User_ReadAccess	Integer	4		
WindowLogin	String	33		
Display_Name	String	80		Not in use. **Note:** The user's display name is stored in the AMGR_Resources Table.
Record_Id	Integer	4		
Reports_To	String	12		The user ID of the person the user reports to. This information is used in organizational charts generated by Maximizer.

Appendix B
Glossary of Terms

Glossary of Terms

Use this list of terms to help familiarize yourself with the terminology of Maximizer CRM.

Access Rights – security settings for users. Access rights control each user's permissions to read, insert, modify, or delete various types of Maximizer entries. They also control general Maximizer privileges, user roles, and allowed printing destinations. Access rights determined by the user's access settings and the access settings of any security groups the user belongs to.

Access Settings – there are two types of access settings: user access settings and group access settings. Combined user and group access settings determine a user's access rights.

Accounting Link – a Maximizer add-on that enables users to connect to QuickBooks or Microsoft Dynamics GP through Maximizer. For more information, refer to the *Accounting Link User's Guide* or the Maximizer website.

Address Book – a Maximizer database.

Address Book entry – a Company, Individual, or Contact in the Maximizer Address Book.

Administrator – a Maximizer module in which the Address Book administrator can perform system configuration and maintenance for the Maximizer system and Address Books.

Administrator's Guide – a Maximizer reference guide for system administrators.

Advanced Import – importing an MXI or XML file into an Address Book.

Application Server – see Maximizer Application Server.

Automated campaign – a series of automated email messages, faxes, or printed documents that Maximizer sends on a predefined schedule. An Automated campaign is based on an Automated campaign template.

Calendar – a Maximizer window in which you can manage your appointments.

campaign template – a pre-defined strategy used by Email and Traditional marketing campaigns. See Automated Campaign and Traditional Campaign.

catalog – a product listing created using eStore. You build your catalog by adding sections and catalog items, and publish the catalog on your web server.

catalog item – an individual product or service in your online catalog.

catalog section – a category for classifying types of catalog items.

Company – an Address Book entry used to record information for a company or organization.

Company Library – a shared library of company literature.

Contact – an Address Book entry used to record information for an individual person associated with a Company or Individual type of Address Book entry.

Controlling window – a main Maximizer window, such as the Address Book window, that determines what tabbed following windows are displayed. The contents of the following window depend on which entry is selected in the main controlling window.

Crystal Reports – a tool for generating reports. Crystal reports are available for viewing and generation through the Reports menu in Maximizer.

default entry – an entry (such as an Address Book entry) containing default field values that are propagated to new entries by default.

ecBuilder – a tool to automate web-based sales.

eStore Manager – a Maximizer module used to create and publish a web-based catalog in which website visitors can purchase products online.

Escona – the Escona Address Book is a sample Address Book included with a typical installation of Maximizer. Using the example of a fictitious vintner in the Sonoma Valley, this Address Book demonstrates many of Maximizer's possibilities.

Following window – a tabbed sub-window of a controlling window. The contents of the following window depend on which entry is selected in the main controlling window. For example, the Contacts window displays only those Contacts that belong to the selected entry in the Address Book window.

Global Edit – a Maximizer operation that enables you to apply the same change to multiple Maximizer entries simultaneously.

Holiday Editor – a tool in Administrator for adding holidays to the Maximizer Calendar window.

Hotlist – a window in Maximizer used to display tasks and appointments in a specific date range.

HTML – HyperText Markup Language. A document format used for displaying web pages in a browser.

IIS – see Microsoft Internet Information Server.

intranet – an internal network—much like the Internet—that is self-contained with the local area network (LAN). Frequently, a web server is used to display pages that should be accessible only within the company.

IP address – a number used to uniquely identify a specific computer on a network. Every network-connected computer has an IP address.

In Maximizer, you use the IIS server's IP address when you preview or publish your online catalog.

Java servlet engine – a Java-based portion of the Payment Gateway Module that is used for online transaction processing.

Dashboard – a component of Maximizer Web Access that displays real-time information on your company using dashboard-style instrumentation.

Knowledge base – a database containing articles pertaining to solutions for customer service and/or technical issues.

lead – an Address Book entry that has been flagged as a potential client or customer.

list – a listing of entries in Maximizer. You can create a list using a search or by selecting specific entries and reducing the list to the selection. Most activities are performed for the current list or the current entry.

log in – the act of entering your user ID and password to gain access to a Maximizer Address Book. The Login dialog box prompts you for your user ID and password.

Macromedia JRun Java Servlet Engine – a Java servlet engine used for online transaction processing. JRun is only one possible Java servlet engine that you may use. See the *Maximizer CRM Administrator's Guide*.

marketing team – used with campaigns to organize marketing efforts in a team environment. Set up using Administrator.

MASTER user – the Address Book administrator's user ID. This user ID permits access to Administrator.

MaxExchange Site Manager – a utility for creating and managing sales and marketing teams. MaxExchange Site Manager is accessed through Administrator.

MaxExchange – a Maximizer program used to synchronize an Address Book between a central server and remote distribution sites via FTP, email, or a direct network connection.

Maximizer – a Maximizer module in which you can perform contact management and sales force automation activities.

Maximizer Application Server – the principal Windows Server where you install Maximizer.

Maximizer Remote Workstation (MaxExchange Remote) – a computer that has the Maximizer client components installed and connects to the Maximizer Application Server.

merge field – text inserted into a document or template that is replaced by Address Book information during a mail merge. For example, a merge field can be a Contact's name, so you can customize a letter's salutation with the recipient's name.

Microsoft Internet Information Server – Microsoft web server software. IIS 5.0 is included with Windows 2000. Internet Information Server—or "IIS"—is used for many of the Maximizer components.

Microsoft SQL Server – a database server used by Maximizer for the Address Book data.

Microsoft Windows Server – the operating system used by the servers.

note – a text document attached to Address Book entries, Contacts, opportunities, and campaigns.

OLE – object linking and embedding (OLE) is a technology that allows you to insert files, portions of files, and links to files into a document or application. You can insert files in the Documents window and the Company Library. Double-clicking the file opens it in the associated (and installed) application.

online – information that is "online" is sometimes used to describe information on the Internet or on your computer screen. An "online" user guide or "online" Help is documentation displayed on your screen.

opportunity – an entry in Maximizer used to record an opportunity to make a sale. Opportunities can organize a sales team using a structured sales strategy.

OrderDesk – a window in Maximizer used to manage orders and inquiries from your online catalog.

Outlook Synchronization – a Maximizer feature for synchronizing some Maximizer entries, such as Address Book entries, between Maximizer and Microsoft Outlook.

order screens – some of the screens displayed to a customer when he/she orders a catalog item. Order screens can be customized by editing the order screen templates (see the eStore Help).

preferences – a collection of program options that allow users to customize how Maximizer functions. Some preferences are set in Administrator; some are set in the modules.

prospect – a potential customer. ListsNOW.com lets you acquire and import lists of prospects. You can then use the data for your marketing campaigns or sales prospecting activities.

related entries – an entry that records a relationship between two Address Book entries. For example, one Address Book entry might be an accountant for another Address Book entry, which could be recorded as a related entry in Maximizer.

sales team – a team created using Administrator to support team-based work on sales opportunities in Maximizer.

search engine – a website on the Internet that keeps a searchable index of websites. You can register your website with a search engine so customers can find your site by performing a search. Examples of search engines are Google and Yahoo!.

security group – a set of access settings for a subset of Maximizer users.

shopping basket – much like a real shopping basket, the eStore shopping basket lets customers add items as they browse your catalog and see a list of items before they proceed to the order screens.

strategies – a structured, team-based approach to pursuing sales opportunities. Strategies define the steps, activities, and roles involved in successfully completing a sale.

SMTP – an SMTP server is a server used for outgoing Internet email.

SQL – see Microsoft SQL Server.

template – a file that outlines the design for a document, email message, or web page. Maximizer uses templates for word processor documents, for automated activities that belong to Automated campaigns, and for HTML pages used by eStore. Templates can contain merge fields for bulk mailings. Also, see Campaign Template.

thin-client applications – allow you to remotely access Maximizer Address Book data using the web. "Maximizer on the Web" consists of Maximizer Web Access, Wireless Access, Partner Wireless Access, and Customer Wireless Access.

Traditional campaign – used to organize a marketing effort, including a marketing team's steps, activities, and roles.

Training Guide – the Maximizer CRM Training Guide and CD introduces Maximizer using exercises and examples. You can obtain the Maximizer CRM Training Guide and CD where you purchased Maximizer.

transaction processing – credit card transactions can be processed from your online catalog using a transaction processing company.

UNC – Universal Naming Convention. A kind of network path used to locate files and folders. An example of a UNC path is "\\Escona\MxServer\".

user-defined field – a custom field used to record additional "user-defined" information for Address Book entries, opportunities, campaigns, customer service cases, and users.

user ID – a name that uniquely identifies a Maximizer user. Users must enter their user ID and password in order to gain access to a Maximizer Address Book.

virtual directory – an IIS folder that “points” to a physical location on the server. The contents of the physical folder that the virtual directory refers to is accessible to the Internet or intranet via the IIS server.

Windows Server – see Microsoft Windows Server.

wizard – a series of interactive screens that walk you through the steps necessary to perform an action or procedure in a program. For example, eStore uses a wizard to help you create your online catalog.

workstation – see Maximizer Workstation.

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